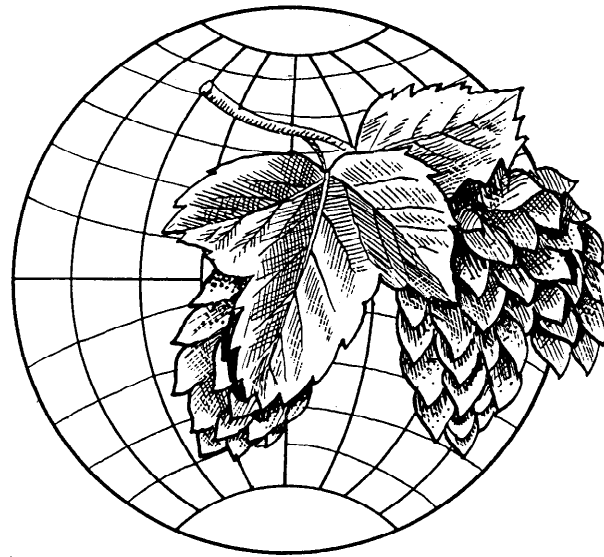


# INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

ŽALEC, SLOVENIA  
JULY, 2019



# International Hop Growers' Convention

## IHGC - Economic Commission Summary Reports

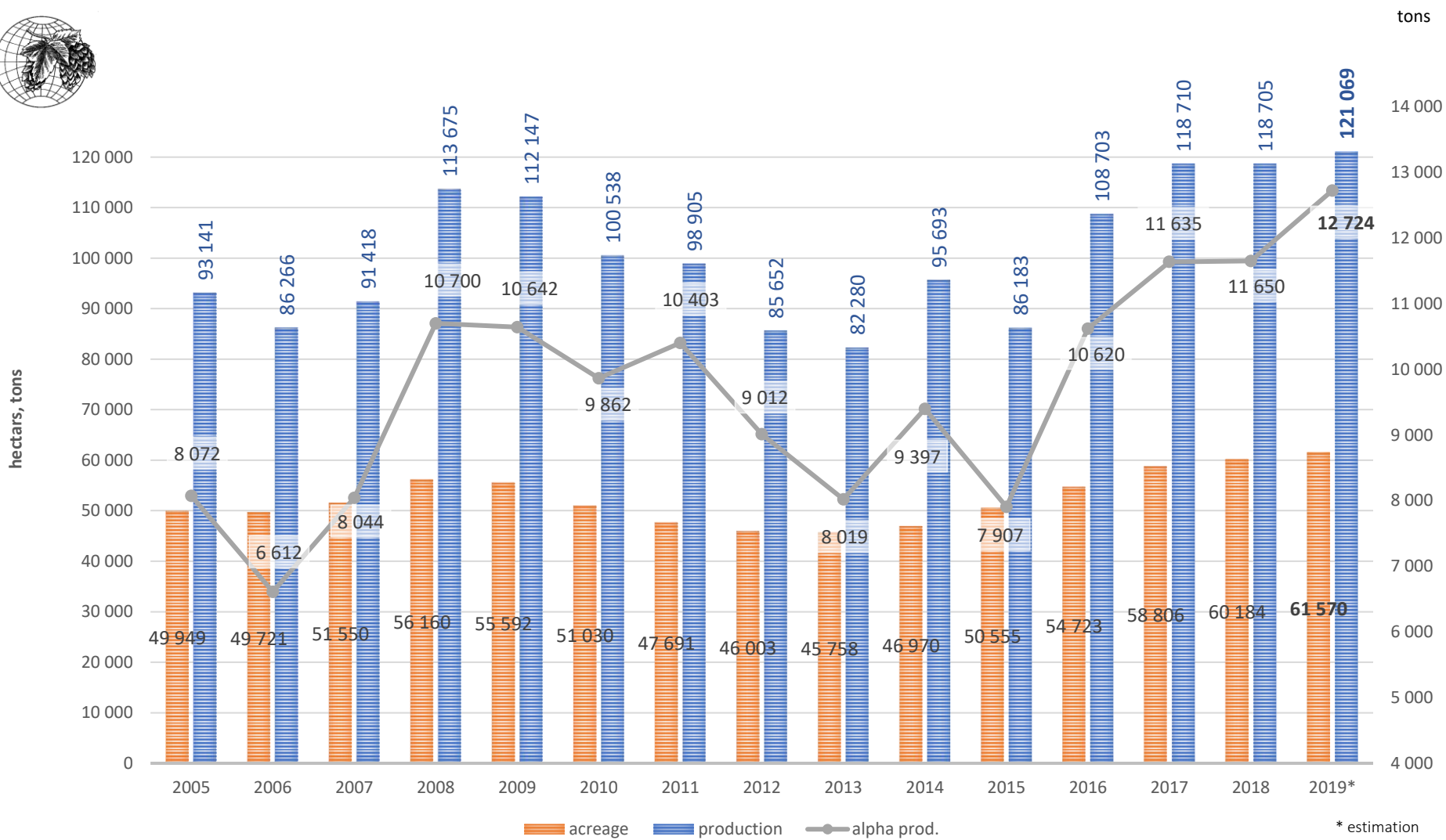
Žalec, Slovenia - July 30, 2019

Country	Hop Acreage 2018 (Hectares, Ha)					Hop Production 2018 (in MT = 1.000 kg)				Alpha acid Prod. MT	Hop Acreage 2019 (Hectares, Ha) estimations					Hop Production 2019 (in MT = 1.000 kg) estimations				Alpha acid Prod. MT
	Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	Aroma		Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	MT		
Argentina	100	60	160	0	<b>160</b>	180	100	<b>280</b>	<b>25</b>	100	60	160	0	<b>160</b>	110	50	<b>160</b>	<b>10</b>		
Australia	454	177	631	21	<b>652</b>	1 159	423	<b>1 582</b>	<b>225</b>	476	176	652	48	<b>700</b>	1 385	260	<b>1 645</b>	<b>217</b>		
Austria	192	58	250	7	<b>250</b>	380	70	<b>450</b>	<b>30</b>	194	58	253	3	<b>253</b>	360	95	<b>455</b>	<b>36</b>		
Belgium	126	54	180	0	<b>180</b>	163	119	<b>282</b>	<b>18</b>	124	58	182	0	<b>182</b>	180	138	<b>318</b>	<b>19</b>		
Canada <sup>o</sup>	219	200	419	0	419	329	300	629	63	219	200	419	0	419	329	300	629	63		
China <sup>o</sup>	400	2 283	2 683	0	2 683	544	6 500	7 044	600	400	2 283	2 683	0	2 683	544	6 500	7 044	600		
Czech Republic	4 679	45	4 724	296	<b>5 020</b>	5 025	101	<b>5 126</b>	<b>185</b>	4 714	49	4 763	241	<b>5 004</b>	6 180	120	<b>6 300</b>	<b>280</b>		
France	424	39	463	33	<b>496</b>	775	89	<b>864</b>	<b>25</b>	440	26	466	41	<b>506</b>	807	70	<b>877</b>	<b>36</b>		
Germany	10 822	8 465	19 287	857	<b>20 144</b>	20 054	21 740	<b>41 794</b>	<b>4 000</b>	10 860	8 913	19 773	644	<b>20 417</b>	20 900	22 800	<b>43 700</b>	<b>5 000</b>		
Japan	53	53	106	0	<b>106</b>	82	120	<b>202</b>	<b>25</b>	53	53	106	0	<b>106</b>	82	120	<b>202</b>	<b>25</b>		
New Zealand	360	52	412	0	<b>412</b>	679	115	<b>794</b>	<b>70</b>	598	145	743	331	<b>743</b>	780	239	<b>1 019</b>	<b>100</b>		
Poland	635	946	1 581	81	<b>1 662</b>	1 125	2 083	<b>3 208</b>	<b>280</b>	646	1 016	1 662	20	<b>1 682</b>	1 000	1 900	<b>2 900</b>	<b>244</b>		
Romania	73	197	270	7	<b>277</b>	85	130	<b>215</b>	<b>19</b>	75	202	277	3	<b>280</b>	90	165	<b>255</b>	<b>29</b>		
Russia	162	66	228	24	<b>252</b>	192	138	<b>330</b>	<b>18</b>	168	74	242	12	<b>254</b>	200	150	<b>350</b>	<b>20</b>		
Serbia	0	0	8	0	<b>8</b>	0	0	<b>16</b>	<b>2</b>	0	0	8	0	<b>8</b>	0	0	<b>16</b>	<b>2</b>		
Slovakia	137	0	137	0	<b>137</b>	127	0	<b>127</b>	<b>5</b>	129	0	129	4	<b>133</b>	105	0	<b>105</b>	<b>4</b>		
Slovenia	1 526	21	1 547	120	<b>1 667</b>	3 018	60	<b>3 078</b>	<b>160</b>	1 500	21	1 521	75	<b>1 596</b>	2 440	60	<b>2 500</b>	<b>130</b>		
South Africa <sup>o</sup>	73	354	427	0	427	77	677	754	75	73	354	427	0	427	77	677	754	75		
Spain	0	536	536	0	<b>536</b>	0	900	<b>900</b>	<b>109</b>	0	532	532	0	<b>532</b>	0	900	<b>900</b>	<b>109</b>		
Ukraine <sup>o</sup>	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30		
UK-England	948	0	948	0	<b>948</b>	1 377	0	<b>1 377</b>	<b>92</b>	953	0	953	0	<b>953</b>	1 430	0	<b>1 430</b>	<b>95</b>		
USA	17 423	5 956	23 379	846	<b>23 379</b>	33 272	15 901	<b>49 173</b>	<b>5 594</b>	18 489	5 674	24 163	0	<b>24 163</b>	33 280	15 750	<b>49 030</b>	<b>5 600</b>		
<b>IHGC</b>	<b>39 115</b>	<b>19 622</b>	<b>58 745</b>	<b>2 292</b>	<b>60 184</b>	<b>69 043</b>	<b>49 646</b>	<b>118 705</b>	<b>11 650</b>	<b>40 520</b>	<b>19 954</b>	<b>60 483</b>	<b>1 422</b>	<b>61 570</b>	<b>70 679</b>	<b>50 374</b>	<b>121 069</b>	<b>12 724</b>		

<sup>o</sup> Since no country updates were available, figures from Freising in 2019 were used.

<sup>1</sup> Acreage without new hop areas

Difference $\Sigma$ 2019-2018	1 405	332	1 738	-870	<b>1 386</b>	1 636	728	<b>2 364</b>	<b>1 074</b>
Difference $\Sigma$ 2019-2014	13 130	2 341	15 480	-2 215	14 600	20 671	5 890	25 376	3 327
Difference $\Sigma$ 2018-2009	14 815	-8 493	6 332	-3 717	7 419	29 277	-20 371	8 922	2 082





# International Hop Growers' Convention

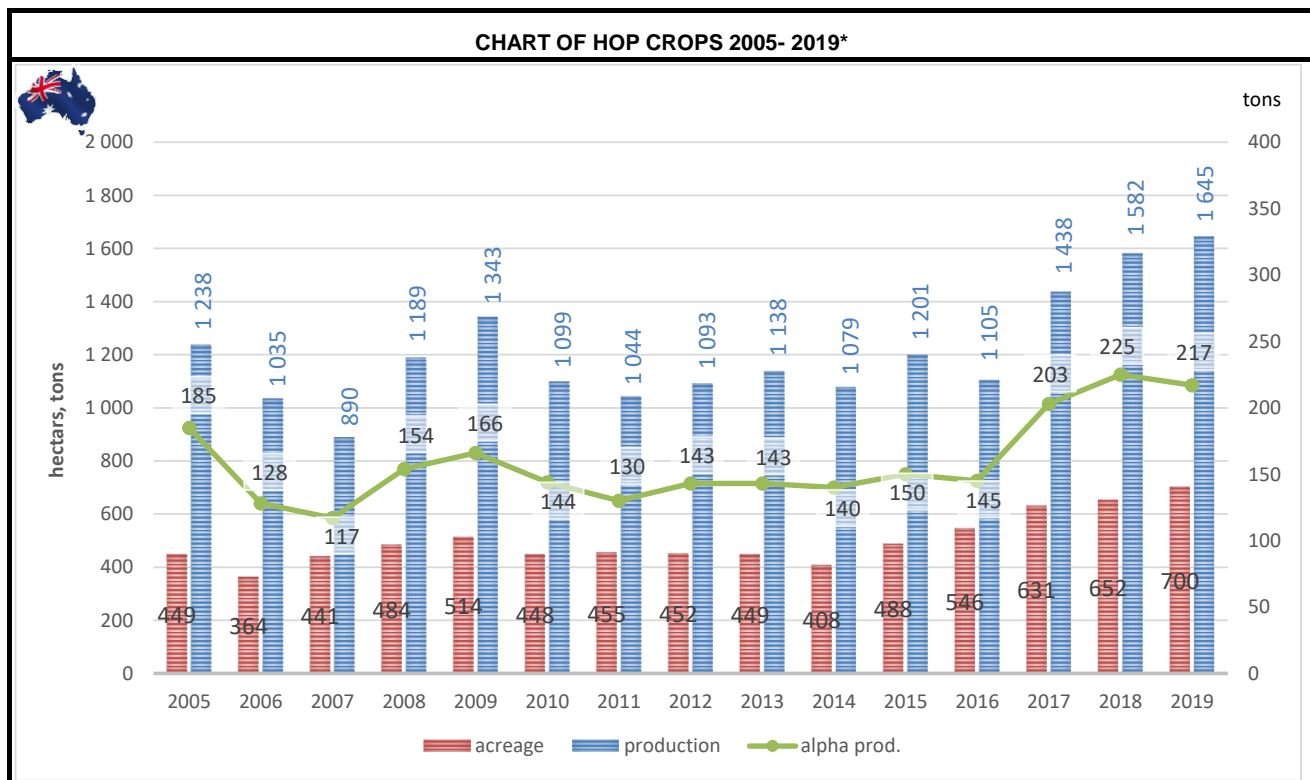
IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country: <b>Australia</b>
------------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	100	90	80	80		

<b>Unsold Hops (MT) : Crop Year (N-1)</b>	<b>2018</b>	<b>Aroma</b>	<b>Alpha</b>	<b>Total</b>
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019	Main O-varieties
O-Hop Area (Ha)			
O-Production (MT)			

Country, Date:  
Australia, 16.7.2019

Member Organization(s):  
BARTH-HAAS Group



# International Hop Growers' Convention

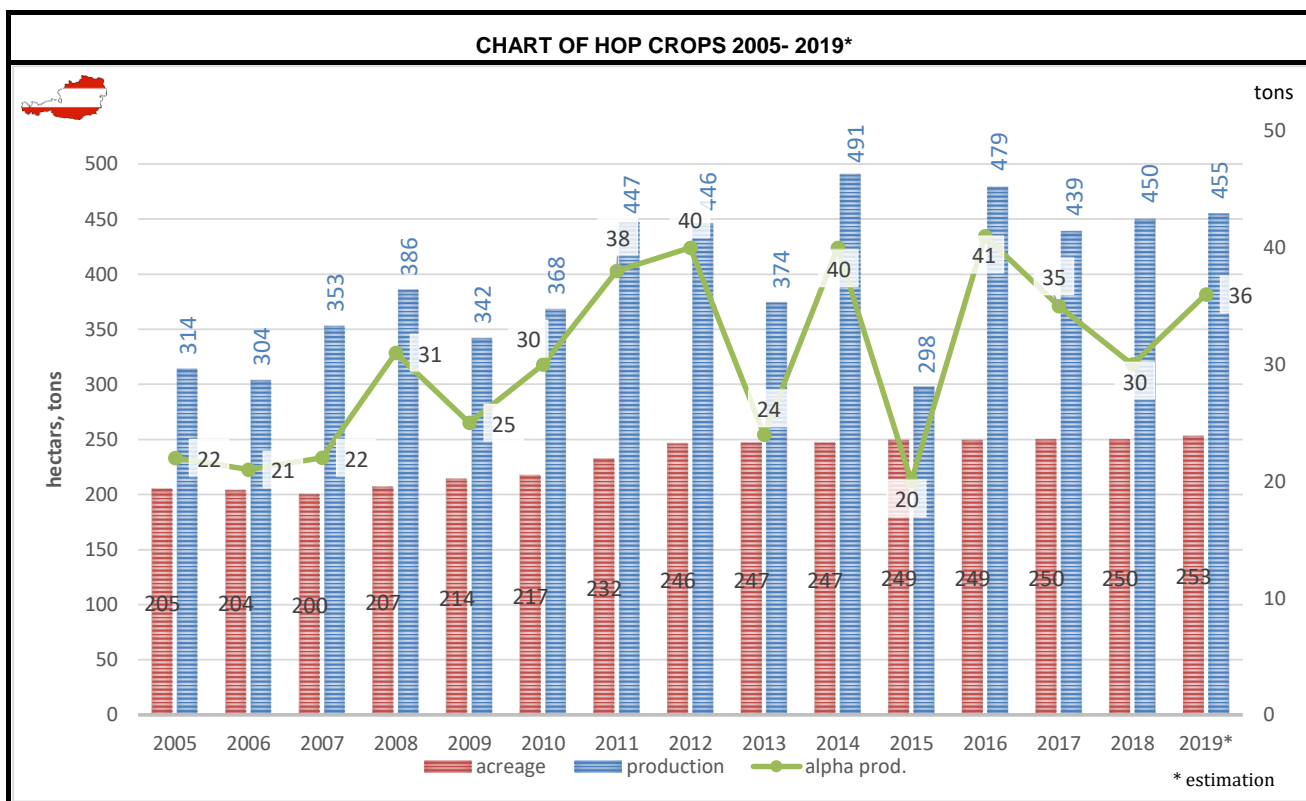
IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:
<b>Austria</b>

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
<b>Situation</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Metric tons	410	395	340	200	175	100
% Crop / Year N	98	85	75	50		

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				0
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops	7,2	7,4	7,5	1,4	
Alpha Hops	7,5	7,5	7,6	1,3	
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	11,7	12,3
O-Production (MT)	14	14

### Main O-varieties

Perle            Spalter Select  
Aurora           Malling        Cascade

Country, Date:

Member Organization(s):  
**Hopfenbaugenossenschaft eGen**





# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

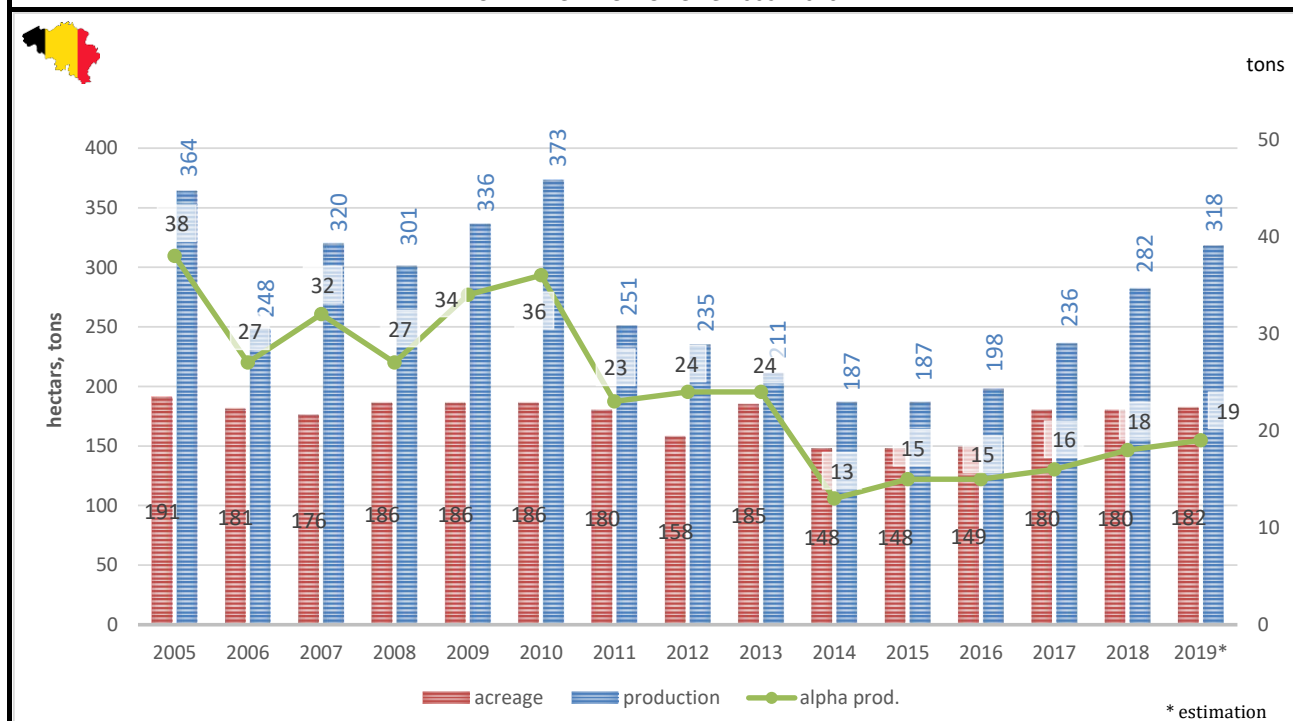
**Belgium**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

CHART OF HOP CROPS 2005- 2019\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	12,3	15,1
O-Production (MT)	17,0	20,0

### Main O-varieties

Golding Pilgrim  
WGV Challenger

Country, Date:

Belgium

19.07.2019

Member Organization(s): **VZW Hop**

Joris Cambie



# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

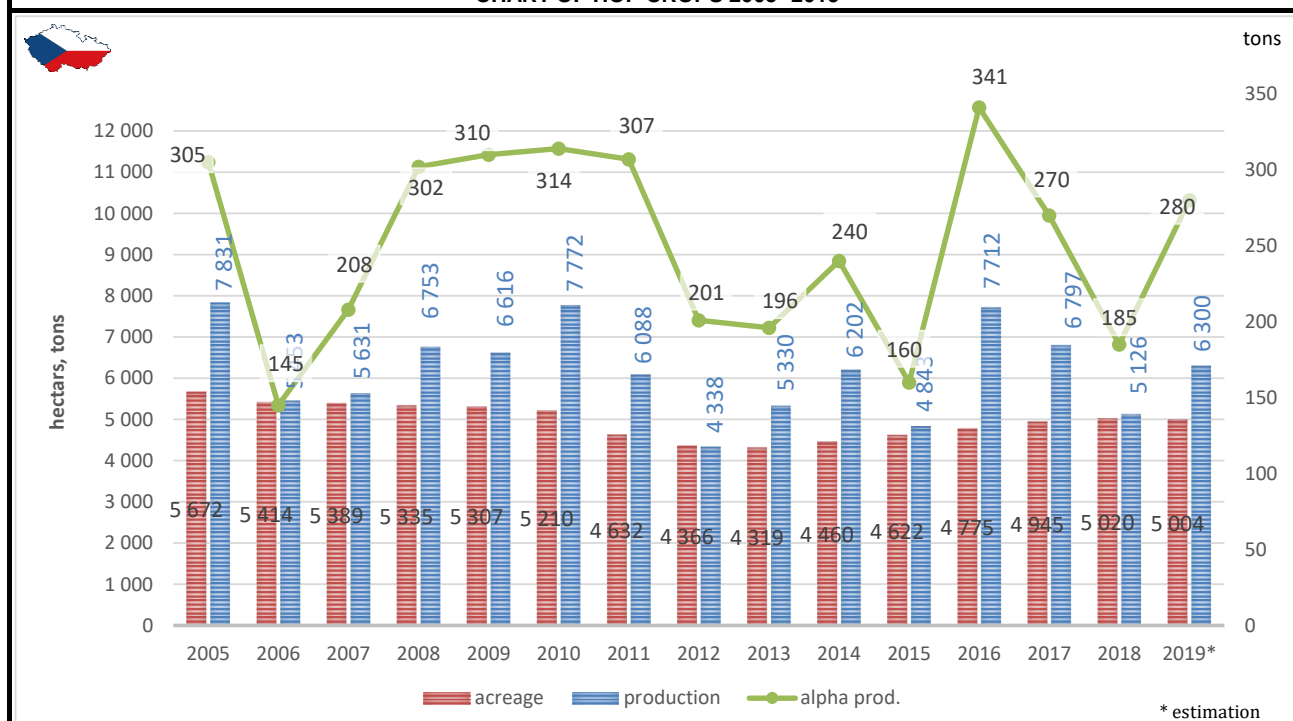
Country:  
**Czech Republic**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	100	100	97	80	75	60

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops	7,3	7,8			farmer price
Alpha Hops	5,0	5,2			farmer price
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

CHART OF HOP CROPS 2005- 2019\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	10,55	10,55
O-Production (MT)	6,90	10,00

Main O-varieties  
Saaz  
Premiant

Country, Date:  
20.07.2019

Member Organization(s):  
Hop Growers Union of the Czech Rep.

# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

**France**

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	424	440	16	3,7
Alpha	39	26	-13	-33,5
Total	463	466	3	0,6

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma	29	35
Alpha	4	6
Total	33	41

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	454	475	21	4,6
Alpha	42	32	-11	-25,2
Total	496	506	10	2,1

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	775	807	32	4,1
Alpha	89	70	-19	-21,3
Total	864	877	13	1,5

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,71	1,70	-0,5
Alpha	2,10	2,21	5,1
Total	1,74	1,73	-0,6

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	17,2	3,2	29,5	4,0	12,3	71,5
Alpha	7,8	7,4	6,5	8,0	-1,3	-16,7
Total	25,0		36,0		11,0	44,0

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>						
Strisselspalt	175,5	171,5	-4			
Aramis	58,1	70,2	12,1			
Tradition	22,2	10,7	-11,5			
Triskel	47,9	45,5	-2,4			
Fuggle	54,9	54,8	-0,1			
Golding	46,8	48,2	1,4			
Challenger	6	6	0			
Barbe-Rouge	12	12,7	0,7			
Mistral	8,9	12	3,1			
Cascade	2,7	4,3	1,6			
Elixir		10,5	10,5			
Brewers Gold	15,7	15,9	0,2			
<b>Alpha</b>						
Columbus	5,4	5,4	0			
Nugget	9,2	12,8	3,6			
Magnum	5,8	5,8	0			
Target	5,65	6,7	1,05			

# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

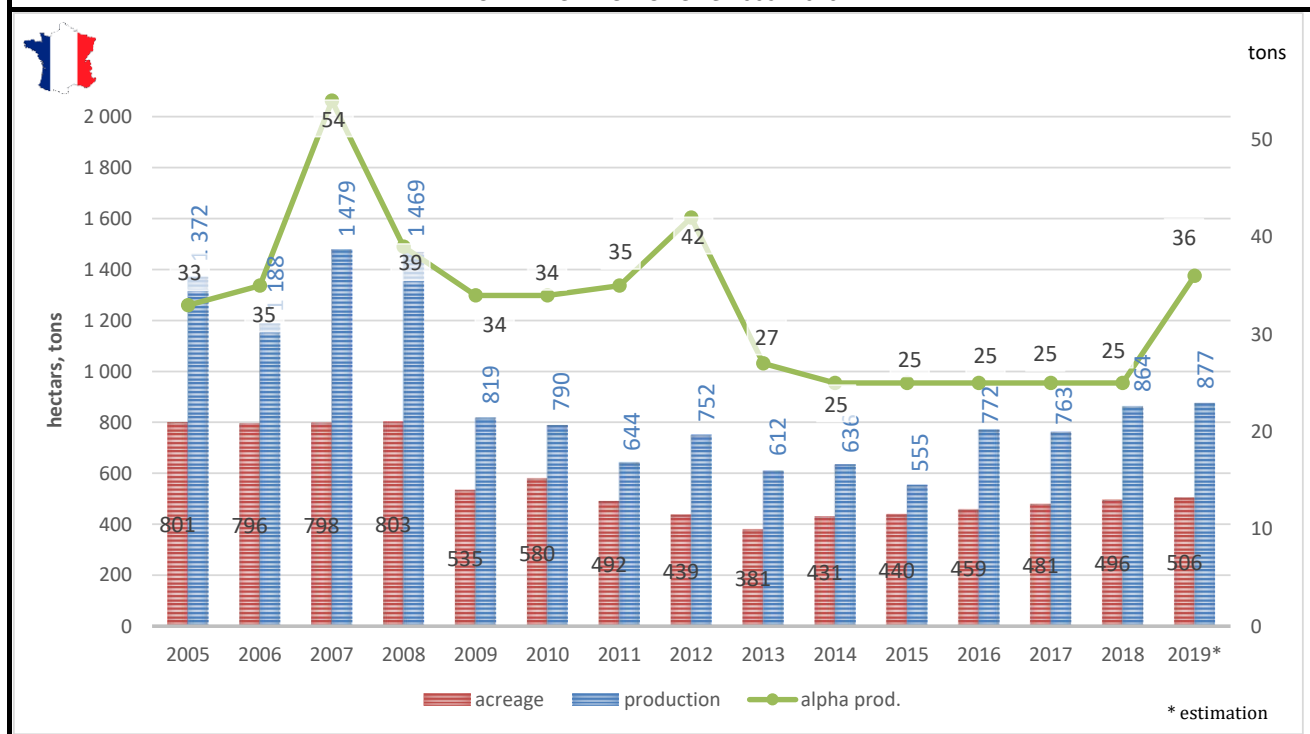
Country: <b>France</b>
---------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	95	90	85	70	60	60

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>		6,50-8,00 €/kg	6,00-8,00 €/kg		

CHART OF HOP CROPS 2005- 2019\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	19,2	19,2
O-Production (MT)	28,1	28,0

Main O-varieties

Country, Date:

Member Organization(s):  
**Francis Heitz**

# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country: <b>Germany</b>
----------------------------

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	10 822	10 860	38	0,4
Alpha	8 465	8 913	448	5,3
Total	19 287	19 773	486	2,5

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma	346	362
Alpha	511	282
Total	857	644

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	11 168	11 222	54	0,5
Alpha	8 976	9 195	219	2,4
Total	20 144	20 417	273	1,4

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	20 054	20 900	846	4,2
Alpha	21 740	22 800	1 060	4,9
Total	41 794	43 700	1 906	4,6

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,8	1,9	3,7
Alpha	2,4	2,5	2,4
Total	2,1	2,1	3,2

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	960	4,8	1 200	5,7	240	1,0
Alpha	3 040	14,0	3 800	16,7	760	2,7
Total	4 000	9,6	5 000	11,4	1 000	1,9

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>						
Perle	3 003	3 148	145	5,5	7,3	1,8
Hall.Tradition	2 712	2 770	58	5	6	1
Hersbrucker	924	918	-6	2	2,8	0,8
Hallertauer	687	678	-9	3,6	3,9	0,3
Tettnanger	750	732	-18	3	3,7	0,7
Spalter Select	578	611	33	3,5	4,7	1,2
Saphir	515	492	-23	3,3	3,8	0,5
Mand. Bavaria	321	298	-23	7,5	7,6	0,1
North. Brewer	293	279	-14	7,4	8,8	1,4
Amarillo	300	206	-94			
Spalter	120	118	-2	3,5	3,6	0,1
<b>Alpha</b>						
Herkules	6 309	6 554	245	14,6	16,4	1,8
Hall. Magnum	1 992	1 954	-38	11,6	13,4	1,8
Hall.Taurus	258	228	-30	13,6	16,1	2,5
Nugget	128	123	-5	10,1	11,2	1,1
Polaris	225	275	50	18,4	19,3	0,9

# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

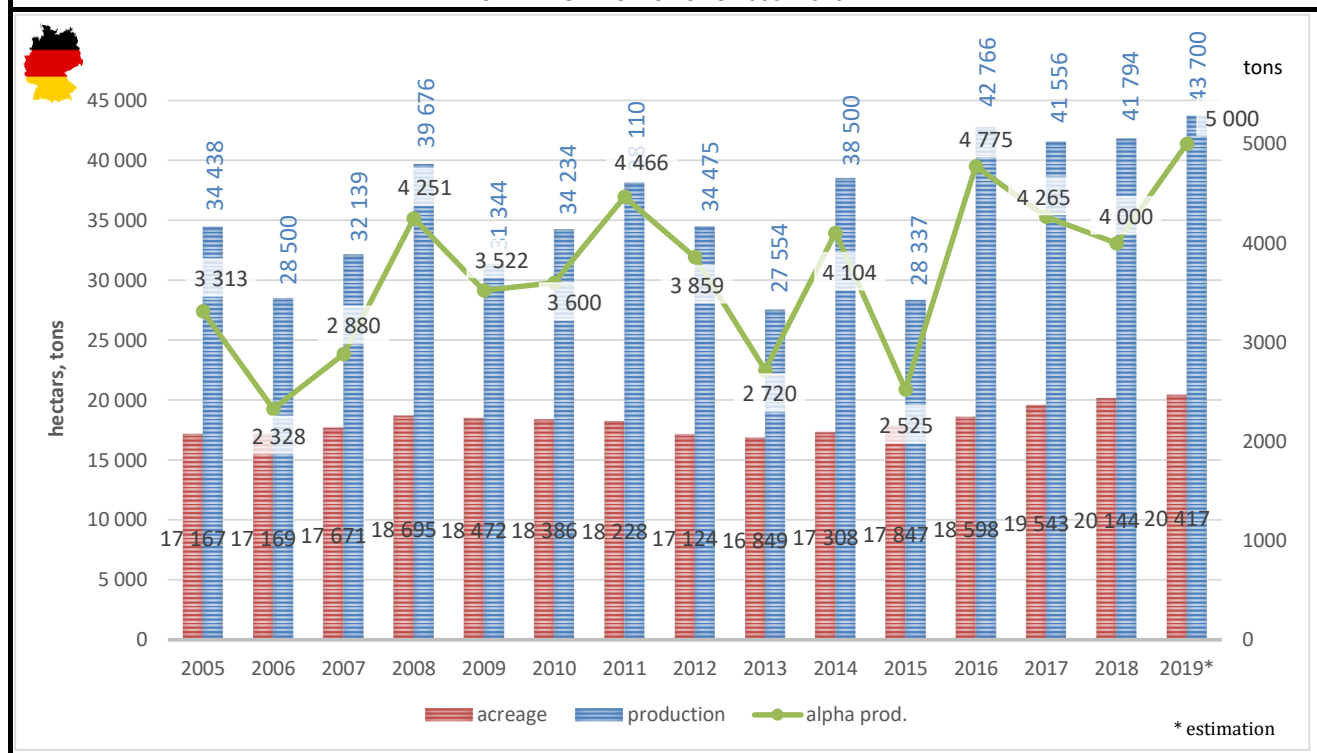
Country:  
**Germany**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
<b>Situation</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Metric tons	42 871	42 944	37 774	35 714	29 937	23 897
% Crop / Year N	98	98	86	82	69	55

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	9,16	7,86		-14,20	Farmer Price
Alpha Hops	10,35	7,59		-26,70	Farmer Price
Average Price	9,74	7,77		-20,20	Farmer Price
<b>Contract Prices</b>					
Aroma Hops	5,51	6,02		9,30	Farmer Price
Alpha Hops	4,36	4,84		11,00	Farmer Price
Average Price	4,9	5,37		9,60	Farmer Price
<b>Average Prices</b>					
Aroma Hops	5,9	6,23		5,60	Farmer Price
Alpha Hops	5	4,97		-0,60	Farmer Price
<b>AVERAGE</b>	5,4	5,58		3,30	Farmer Price

CHART OF HOP CROPS 2005- 2019\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	121	140
O-Production (MT)	160	190

Main O-varieties  
HAT/PER/SSE

Country, Date:  
Germany 25.07.2019

Member Organization(s):  
gez. Brunner





# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

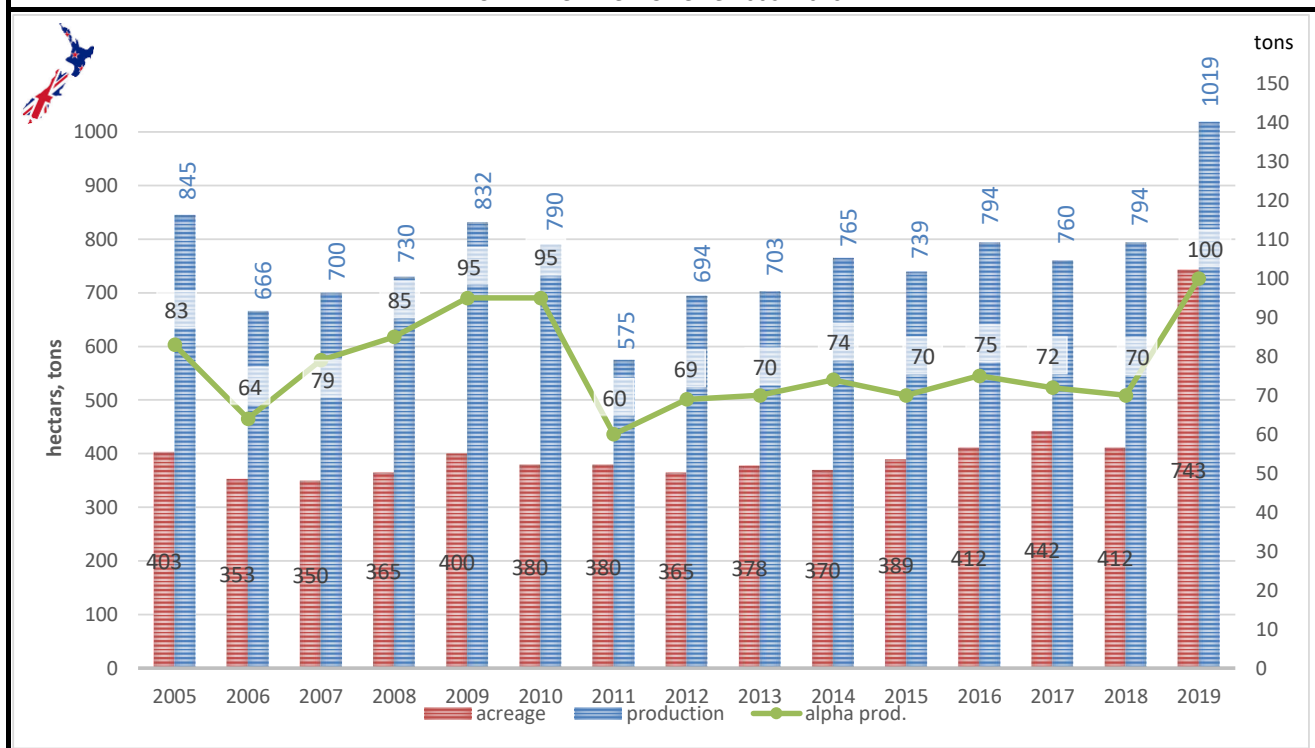
Country:  
**New Zealand**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

CHART OF HOP CROPS 2005- 2019\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

A significant increase in both acreage and volume was seen in 2019 through expansion of existing farms and also an increase in new growing operations was seen in the NZHL cooperative. Yields were reduced through very dry conditions for extended periods in summer and also due to the large of areas of new ground with baby plants. The increase in alpha acreage and volume is attributable to a change in reporting classification where previously some varieties had been reported as aroma / flavour hops. Nelson Sauvín remains being reported as an aroma hop. Organic production was at circa 20 MT and some smaller volumes of trial hops were also produced. Growth continues in the New Zealand Hop Industry with two new growing operations established outside of the NZHL cooperative and we hope to report on these increases in acreage and volume from the 2020 harvest numbers. Market conditions remain favourable for New Zealand Hops.

	Year N-1	Year N 2019
O-Hop Area (Ha)	13	13
O-Production (MT)		

Main O-varieties

Country, Date:  
16.07.2019

Member Organization(s):  
New Zealand, Doug Donelan

# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

**Poland**

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	635	646	11	1,8
Alpha	946	1 016	69	7,3
Total	1 581	1 662	81	5,1

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma	11	10
Alpha	69	10
Total	81	20

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	646	656	10	1,5
Alpha	1 016	1 026	10	1,0
Total	1 662	1 682	20	1,2

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	1 125	1 000	-125	-11,1
Alpha	2 083	1 900	-183	-8,8
Total	3 208	2 900	-308	-9,6

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,74	1,52	-12,5
Alpha	2,05	1,85	-9,7
Total	1,93	1,72	-10,7

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	41	3,6	35	3,5	-5,5	-13,6
Alpha	239	11,5	209	11,0	-30,1	-12,6
Total	280	-	244	-	-35,6	-12,7

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>						
Marynka	310,49	315,49	5	7,1		
Lubelski	404,47	409,47	5	2,1		
Lomik	2,66	2,66	0			
Perle	44,05	44,05	0	4,6		
Sybilla	109,53	109,53	0	3,0		
H. Tradition	61,33	61,33	0	3,5		
Puławski	6,52	6,52	0			
Triskel	1,42	1,42	0	2,95		
Saaz	2,45	2,45	0	2,65		
Cascade	11,38	11,38	0			
Centennial	0,7	0,7	0			
Crystal	0,1	0,1	0			
Tomyski	0,9	0,9	0			
Willamette	0,4	0,4	0			
<b>Alpha</b>						
Magnum	556,7	561,7	5	10,7		
Magnat	125,91	130,91	5	11,9		
Izabella	0,4	0,4	0			
Iunga	11,96	11,96	0			
Chinook	2,2	2,2	0			
Zula	1,2	1,2	0			
New varieties plants	1	1	0			
Taurus	3,68	3,68	0			
Oktawia	2,22	2,22	0			

# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

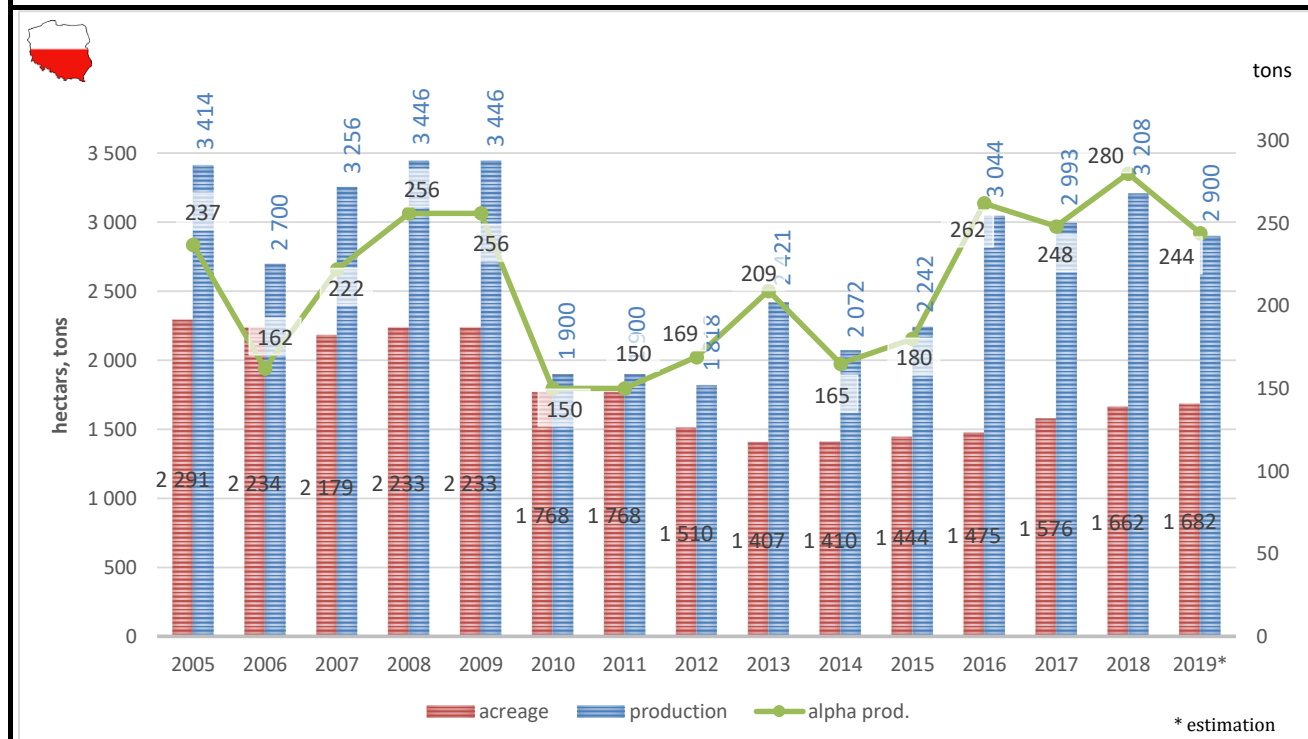
**Poland**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
<b>Situation</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Metric tons	2 000	2 000	2 000	1 000	1 000	1 000
% Crop / Year N	67	67	67	33	33	33

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	4,48	4,65	-	-	Farmers Price
Alpha Hops	5,95	5,81	-	-	Farmers Price
Average Price	5,22	5,23	-	-	Farmers Price
<b>Contract Prices</b>					
Aroma Hops	4,93	4,65	4,65	0	Farmers Price
Alpha Hops	4,8	4,19	4,19	0	Farmers Price
Average Price	4,89	4,42	4,42	0	Farmers Price
<b>Average Prices</b>					
Aroma Hops	4,71	4,65	-	-	Farmers Price
Alpha Hops	5,4	5	-	-	Farmers Price
<b>AVERAGE</b>	<b>5,06</b>	<b>4,83</b>	-	-	Farmers Price

CHART OF HOP CROPS 2005- 2019\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	8,2	9,5
O-Production (MT)	9	11

### Main O-varieties

HMG            MAR            PUL  
MGN            CAS

Country, Date: Poland, 10.07.2019

Member Organization(s):  
Polish Hop Growers Association



# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

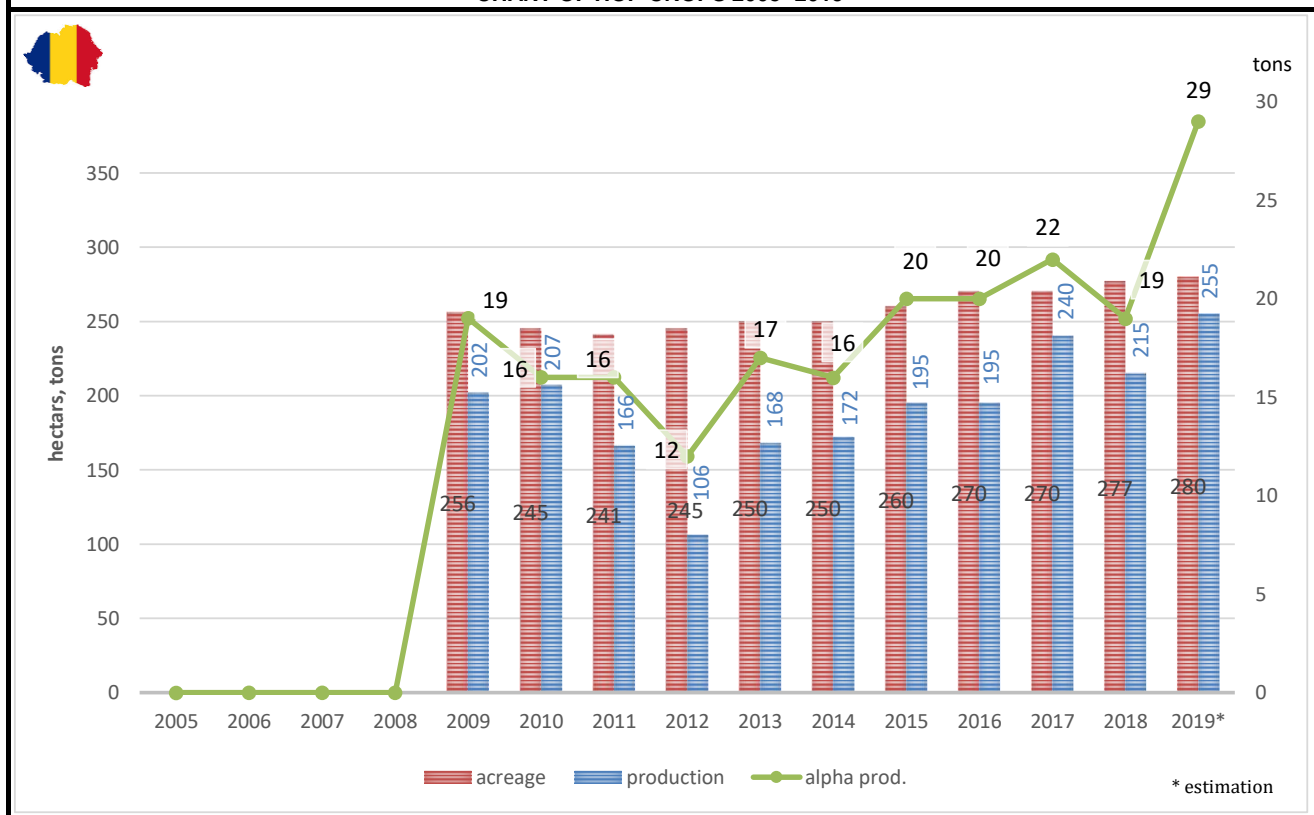
Country:  
**Romania**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons	255	280	300	320	330	340
% Crop / Year N	100	100	100	100	100	100

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

CHART OF HOP CROPS 2005- 2019\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

In the 2019 June 24 we had a hailstorm damage 41 ha area. The production are decreased with 30 -40 %.

	Year N-1	Year N 2019
O-Hop Area (Ha)	0	0
O-Production (MT)	0,00	0,00

Main O-varieties

Country, Date:  
15 July 2019

Member Organization(s):  
**MORA ACATIU ERVIN**



# International Hop Growers' Convention

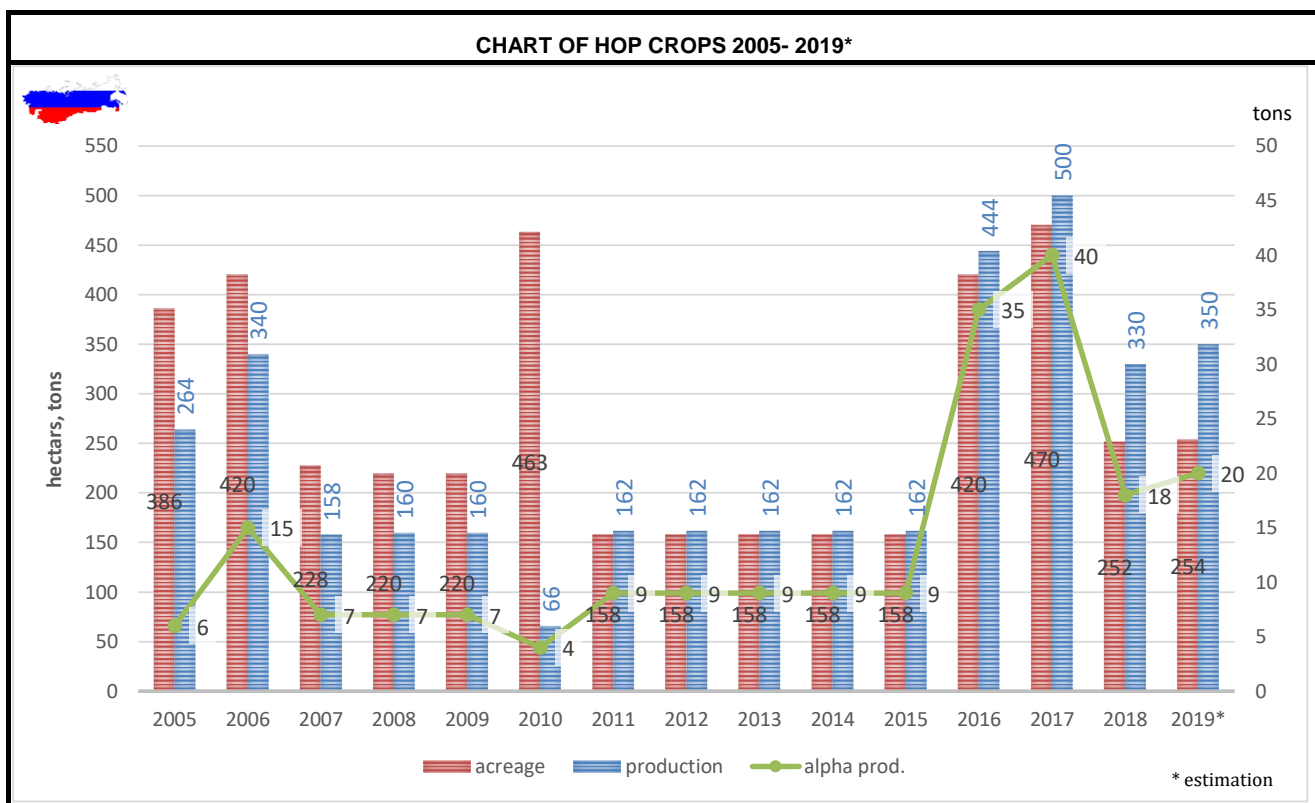
IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country: <b>Russia</b>
---------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons	60					
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019	Main O-varieties
O-Hop Area (Ha)			
O-Production (MT)			

Country, Date:  
22.07.2019

Member Organization(s):  
Tatiana Grigoryeva

# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

**Serbia**

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	8	8	0	0,0

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	8	8	0	0,0

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	16	16	0	0,0

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma			
Alpha			
Total	2,00	2,00	0,0

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	1,5		1,5		0,0	0,0

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Bačka						
Aroma - new variety						
Robusta						
Neoplanta						
Vojvodina						
Dunaj						
<b>Experimental</b>						
Chinook						
Cascade						
CTZ						
Centenial						
ostatní						



# International Hop Growers' Convention

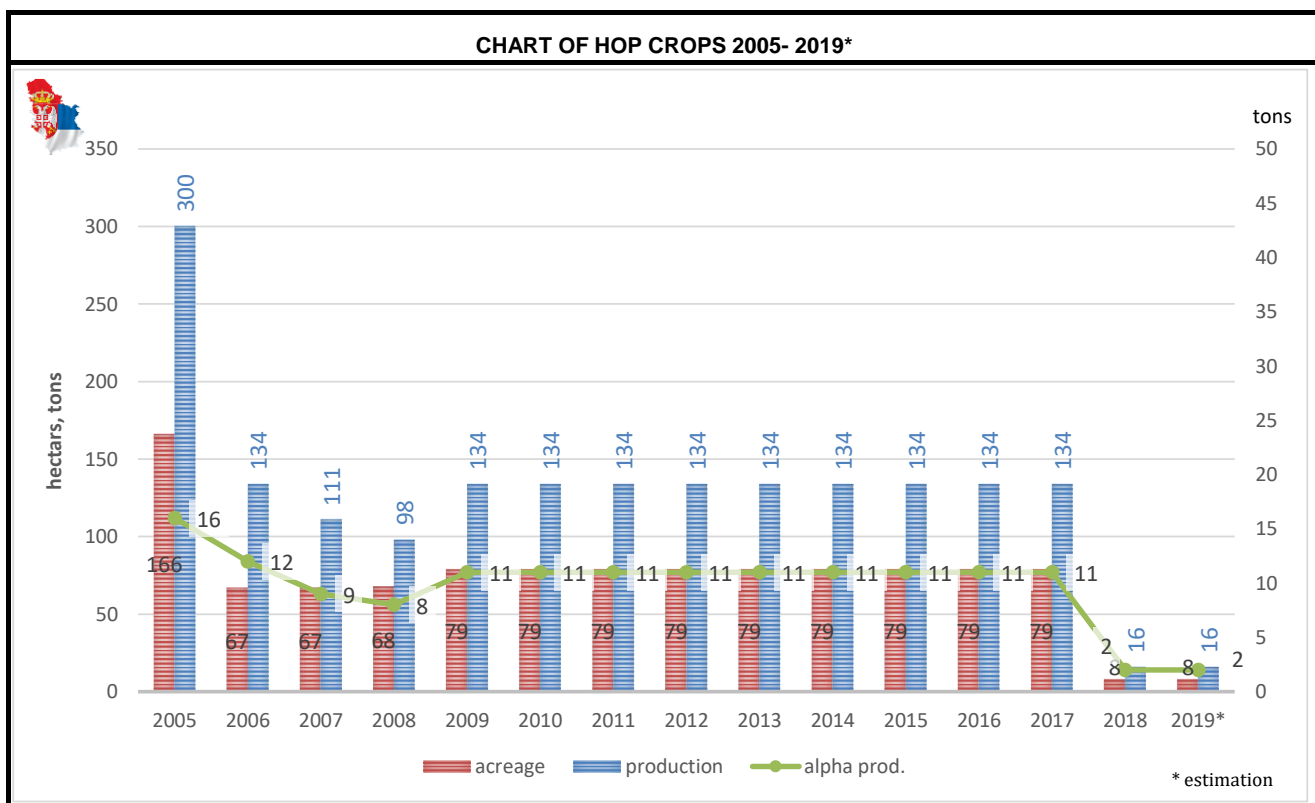
IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country: <b>Serbia</b>
---------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Hop gardens are in property of AS Petrovec (existing trellises - 20 hectares). There are 8 hectares strung for 2019 harvest. New 6 hectares of hops will be put in a ground in fall 2019. Most of all hops are Serbian varieties breded in Hop Institute in Petrovec. Traditional variety is Bačka and Aroma is a new aroma variety. Other varieties breded in the Institute are Robusta, Neoplanta, Vojvodina and Dunaj. There are several experimental hop plants of Chinook, Cascade, CTZ and Centennial. Bačsky hops have a rich tradition dates 250 years back when prof. Andrej Hadik started to grow the first hops. Serbia would like to return on world hop map as well as among IHGC hop countries.

	Year N-1	Year N 2019
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:  
25.07.2019

Member Organization(s):  
prof. Ján Kišgeci



# International Hop Growers' Convention

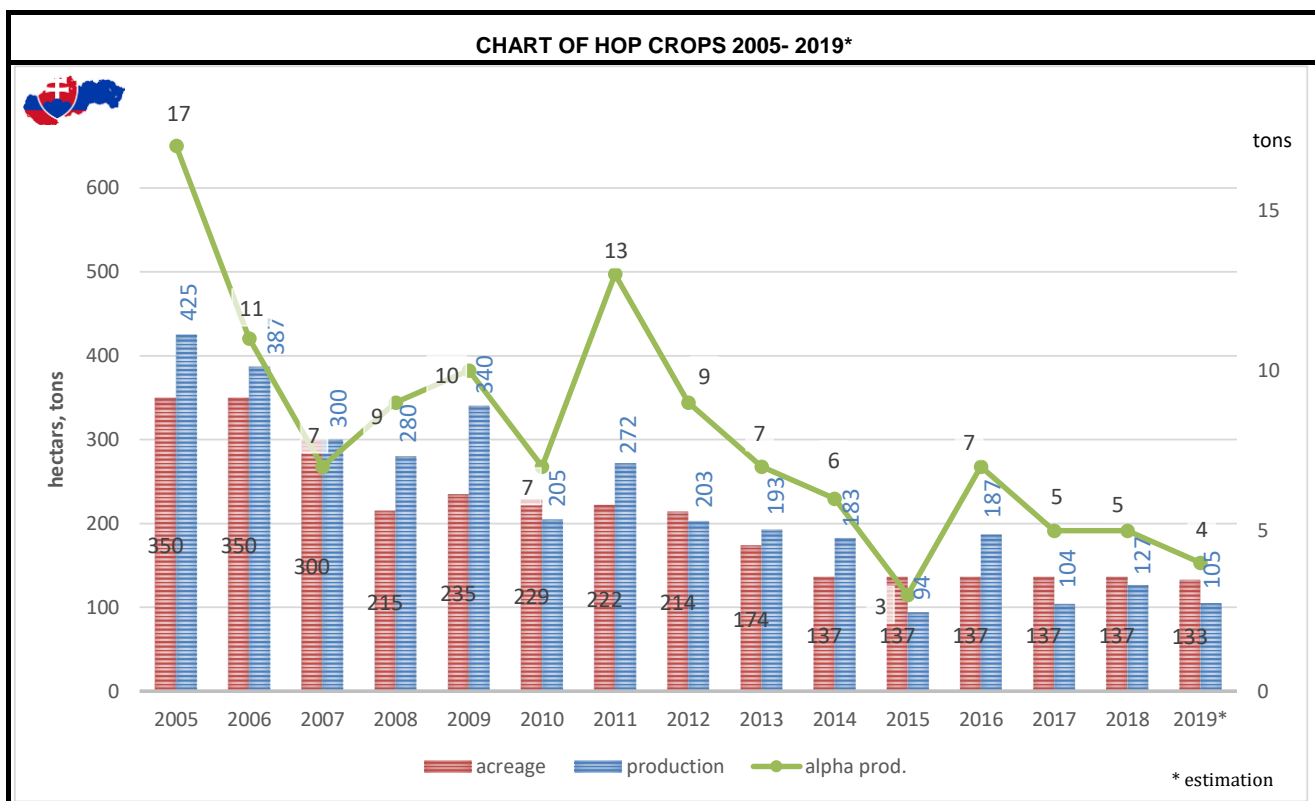
IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country: <b>Slovakia</b>
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Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	100	100	100			

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops	7				
Alpha Hops					
<b>AVERAGE</b>					



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:  
22.07.2019

Member Organization(s):  
Slovchmel' družstvo



# International Hop Growers' Convention

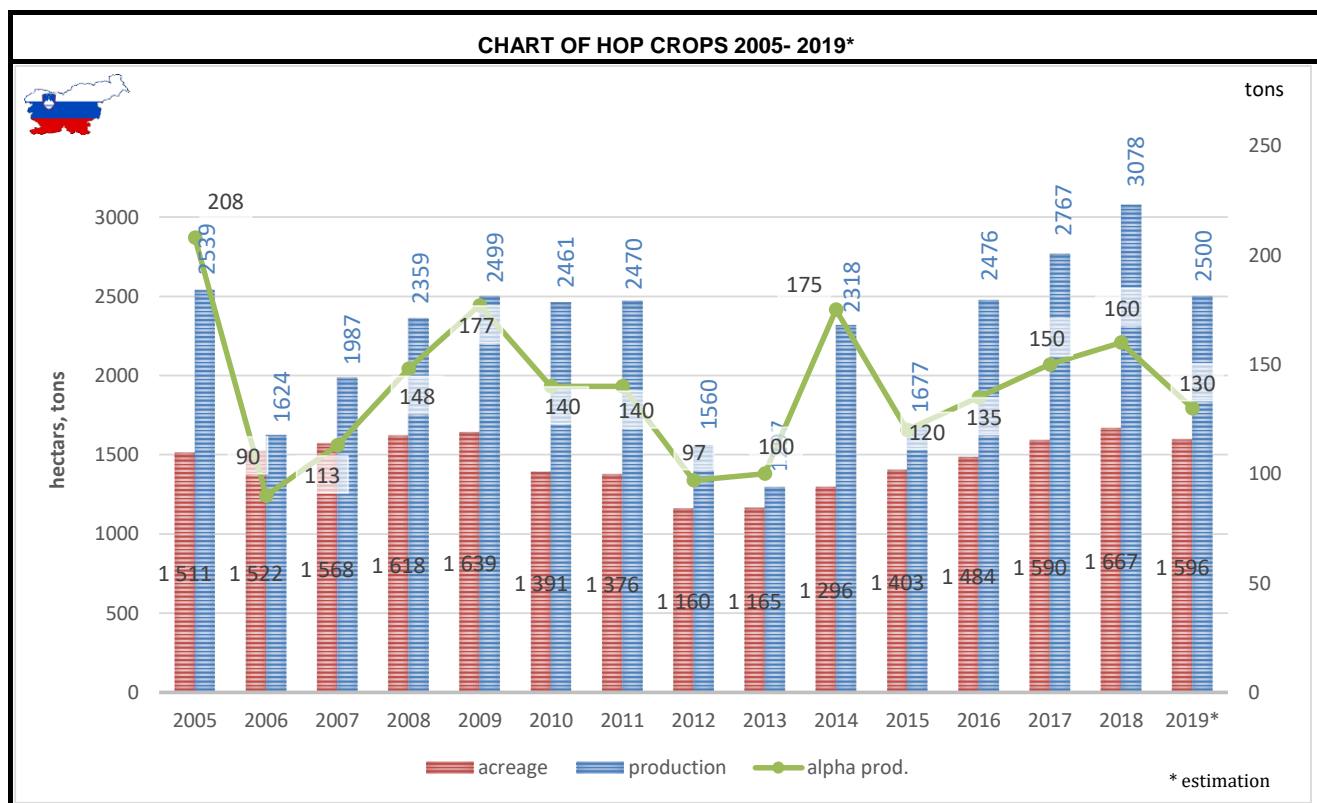
IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country: <b>Slovenia</b>
-----------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
<b>Situation</b>	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	90	85	80	75	70	N.A.

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops	0	0	0	0
% unsold Hops	0	0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>	6,6	7			
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Overall the crop currently looks average. We have had low temperatures in May, high in June, appropriate in July. So far we have a sufficient amount of precipitation. At the end of June and July, we were hit by hailstorms which caused damage in some hop fields.

	Year N-1	Year N 2019
O-Hop Area (Ha)	1	1
O-Production (MT)		

Main O-varieties  
**Styrian Gold**

Country, Date:  
Slovenia, July 19, 2019

Member Organization(s):  
Hop Growers of Slovenia/  
Hmezad exim/Inbarco



# International Hop Growers' Convention

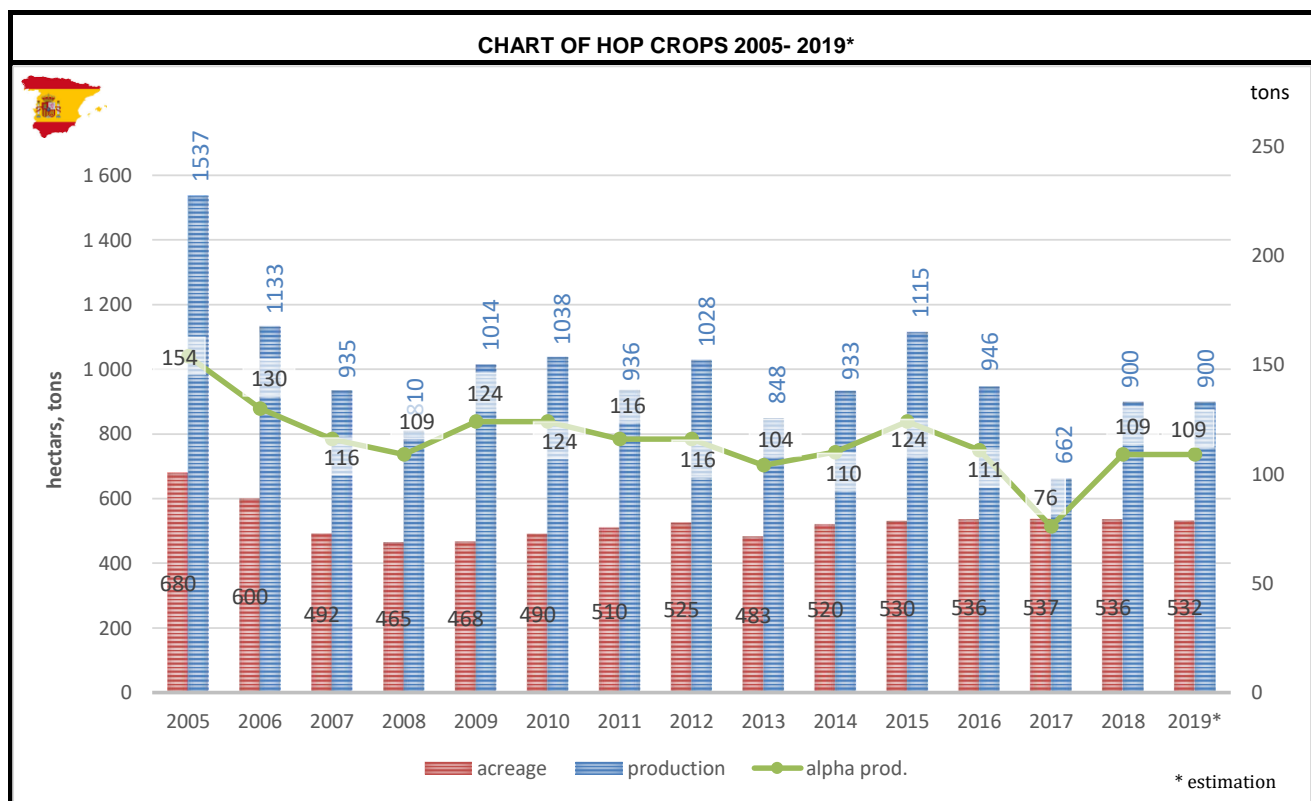
IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country: <b>Spain</b>
--------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:  
26.07.2019

Member Organization(s):  
LÚPULOS DE LEÓN SAT





# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

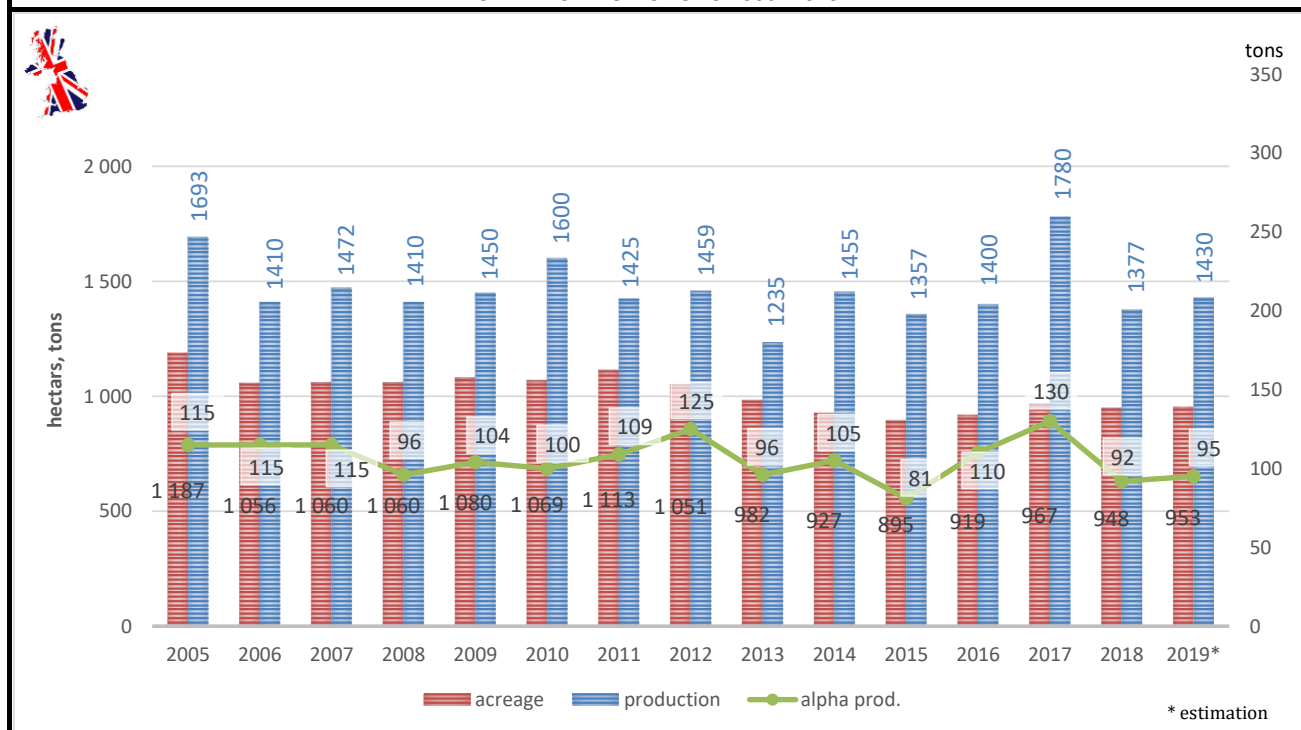
**UK**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	80	80	80	40	20	

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

CHART OF HOP CROPS 2005- 2019\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	4,2	5,8
O-Production (MT)	3,60	3,60

Main O-varieties

Country, Date:  
22.07.2019

Member Organization(s):  
English Hops Limited

# International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

**USA**

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 423	18 489	1066	6,1%
Alpha	5 956	5 674	-282	-4,7%
Total	23 379	24 163	784	3,4%

2019 total acreage: 23,204 ha  
in Pacific Northwest + 960 ha  
outside of Pacific Northwest

New Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 423	18 489	1066	6,1%
Alpha	5 956	5 674	-282	-4,7%
Total	23 379	24 163	784	3,4%

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	33 272	33 280	8	0,02%
Alpha	15 901	15 750	-151	-0,95%
Total	49 173	49 030	-143	-0,29%

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,91	1,80	-5,74%
Alpha	2,67	2,60	0,00%
Total	2,10	2,03	-3,53%

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		EBC %	(estimate)	%		%
Aroma	3 161	9,5%				
Alpha	2 433	15,3%				
Total	5 594	11,4%				

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha % EBC	Year N Alpha %	Difference N-(N-1)
<b>Aroma</b>						
Amarillo®, VGXP01	1 001	874	-127			
Azacca™, ADHA-483	221	238	17			
Cascade	2 488	2 137	-351			
Centennial	1 851	1 468	-383			
Chinook	1 143	958	-185			
Citra®, HBC 394	2 583	3 656	1073			
Cluster	272	188	-84			
Ekuanot™, HBC 366	350	255	-95			
El Dorado®	218	389	171			
Idaho 7™		157	157			
Mosaic®, HBC 369	986	1 710	724			
Sabro™, HBC 438		274	274			
Simcoe®, YCR 14	1 614	1 766	152			
Other PNW Aroma	3 810	3 550	-260			
Non-PNW Aroma	886	869	-17			
<b>Total Aroma</b>	17 423	18 489	1 066			
<b>Alpha</b>				15,30%		
Apollo™	415	238	-177			
Bravo™	149	96	-53			
CTZ	2 477	2 608	131			
Eureka™	219	172	-47			
Galena	202	166	-36			
Hallertauer Magnum	42	31	-11			
Nugget	580	475	-105			
Pahto® HBC 682	696	839	143			
Summit™	637	434	-203			
Super Galena™	270	223	-47			
Other PNW Alpha	171	296	125			
Non-PNW Alpha	98	96	-2			
<b>Total Alpha</b>	5 956	5 674	-282			

# International Hop Growers' Convention

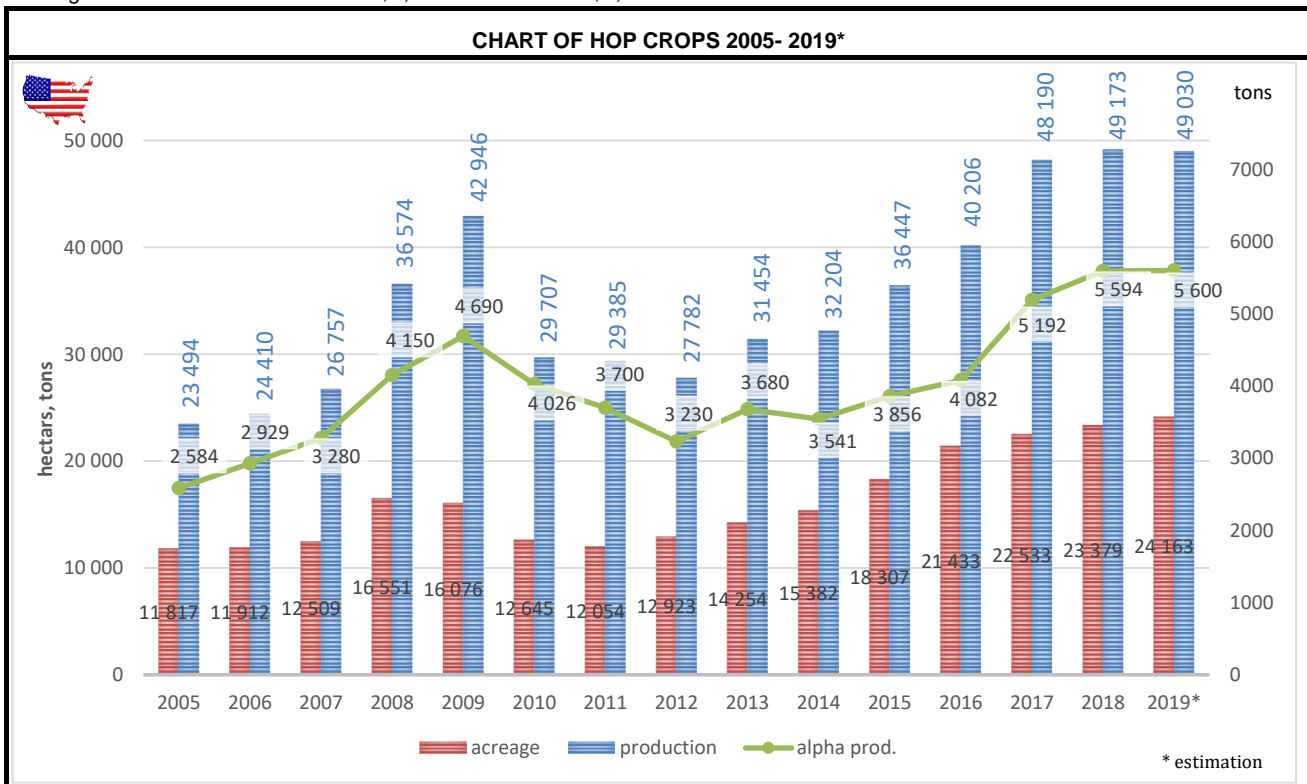
IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country: <b>USA</b>
------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	98%	90%	70%	50%	30%	

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Total Hop Production		33 272	15 901	49 173
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>	10.98 Euro/kg	10.71 Euro/kg			
Average USD/lb.	\$5,60	\$5,46			



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Exchange rate \$1 USD = 0.89 Euro (17 April 2019). Alpha and aroma classifications are based on IHGC list of hop varieties. The USDA statistical reporting system is voluntary, and individual varieties are not reported if three or fewer growers produce the variety in each state. 2019 total acreage includes 3,013 ha of baby hops (932 ha of expansion and 2,081 ha of existing hop acreage converted to new varieties), many of which will not be harvested.

	Year N-1	Year N 2019	
O-Hop Area (Ha)	174	239	27% increase
O-Production (MT)	217		

Main O-varieties

A total of 11 Pacific Northwest hop growers reported Organic hops

Country, Date: USA

IV.19

Member Organization(s):  
Hop Growers of America