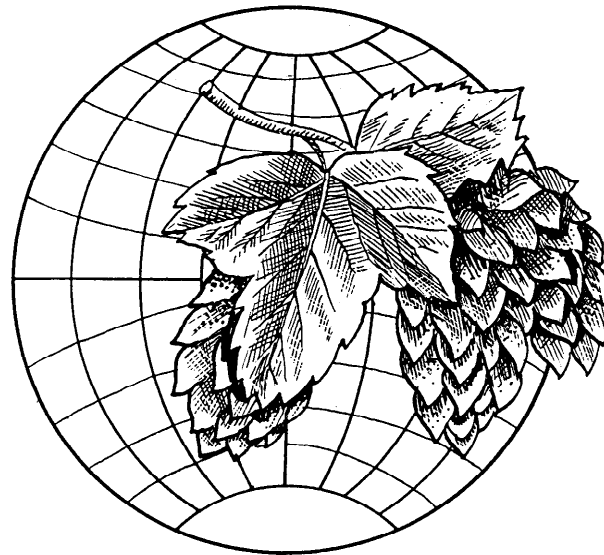


# INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

NUREMBERG, GERMANY

NOVEMBER, 2019



# International Hop Growers' Convention

## IHGC - Economic Commission Summary Reports

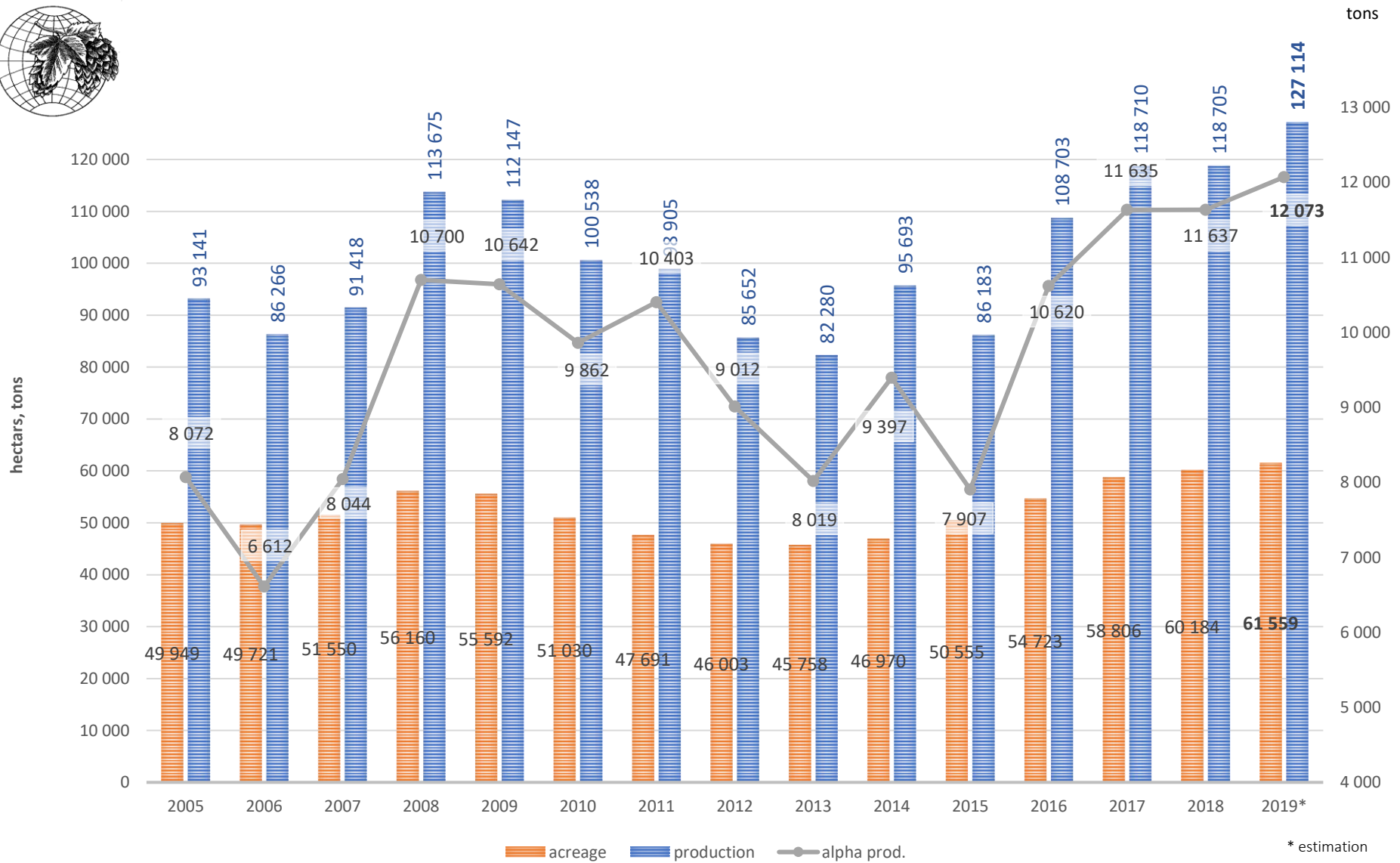
Nuremberg, Germany - November 11, 2019

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 <sup>°</sup>	100	60	160	0	160	180	100	280	25	100	60	160	0	160	110	50	160	10		
Australia <sup>°</sup>	454	177	631	21	652	1 159	423	1 582	225	476	176	652	48	700	1 385	260	1 645	217		
Austria	192	58	250	7	250	380	70	450	30	194	58	253	3	253	368	124	492	38		
Belgium	126	54	180	0	180	163	119	282	18	124	58	182	0	182	172	124	296	25		
Canada <sup>°</sup>	219	200	419	0	419	329	300	629	63	219	200	419	0	419	329	300	629	63		
China <sup>°</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	5 020	5 025	101	5 126	185	4 706	49	4 755	248	5 003	6 770	130	6 900	292		
France	424	39	463	33	496	775	89	864	25	440	26	466	39	505	728	94	822	34		
Germany	10 822	8 465	19 287	857	20 144	20 054	21 740	41 794	4 000	10 860	8 913	19 773	644	20 417	22 500	25 900	48 400	5 200		
Japan <sup>°</sup>	53	53	106	0	106	82	120	202	25	53	53	106	0	106	82	120	202	25		
New Zealand <sup>°</sup>	360	52	412	0	412	679	115	794	70	598	145	743	331	743	780	239	1 019	100		
Poland	635	946	1 581	81	1 662	1 125	2 083	3 208	280	646	1 016	1 662	20	1 682	1 000	1 900	2 900	244		
Romania	73	197	270	7	277	85	130	215	19	75	185	260	3	263	90	105	195	20		
Russia <sup>°</sup>	162	66	228	24	252	192	138	330	18	168	74	242	12	254	200	150	350	20		
Serbia <sup>°</sup>	0	0	8	0	8	0	0	16	2	0	0	8	0	8	0	0	16	2		
Slovakia	137	0	137	0	137	127	0	127	5	129	0	129	4	133	108	0	108	5		
Slovenia	1 526	21	1 547	120	1 667	3 018	60	3 078	160	1 500	21	1 521	75	1 596	2 502	70	2 572	131		
South Africa <sup>°</sup>	73	354	427	0	427	77	677	754	75	73	354	427	0	427	77	677	754	75		
Spain	0	536	536	0	536	0	900	900	94	0	535	535	0	535	0	830	830	94		
Ukraine <sup>°</sup>	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30		
UK-England	779	169	948	0	948	1 050	327	1 377	94	787	171	958	0	958	1 353	343	1 696	120		
USA	17 423	5 956	23 379	846	23 379	33 272	15 901	49 173	5 594	18 489	5 674	24 163	0	24 163	35 414	14 190	49 604	4 728		
<b>IHGC</b>	<b>38 946</b>	<b>19 791</b>	<b>58 745</b>	<b>2 292</b>	<b>60 184</b>	<b>68 716</b>	<b>49 973</b>	<b>118 705</b>	<b>11 637</b>	<b>40 346</b>	<b>20 111</b>	<b>60 466</b>	<b>1 427</b>	<b>61 559</b>	<b>74 912</b>	<b>52 186</b>	<b>127 114</b>	<b>12 073</b>		

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

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

Difference $\Sigma$ 2019-2018	1 400	320	1 721	-865	1 375	6 196	2 213	8 409	436
Difference $\Sigma$ 2019-2014	12 956	2 498	15 463	-2 210	14 589	24 904	7 702	31 421	2 676
Difference $\Sigma$ 2018-2009	14 641	-8 336	6 315	-3 712	7 408	33 510	-18 559	14 967	1 431





# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

Country:

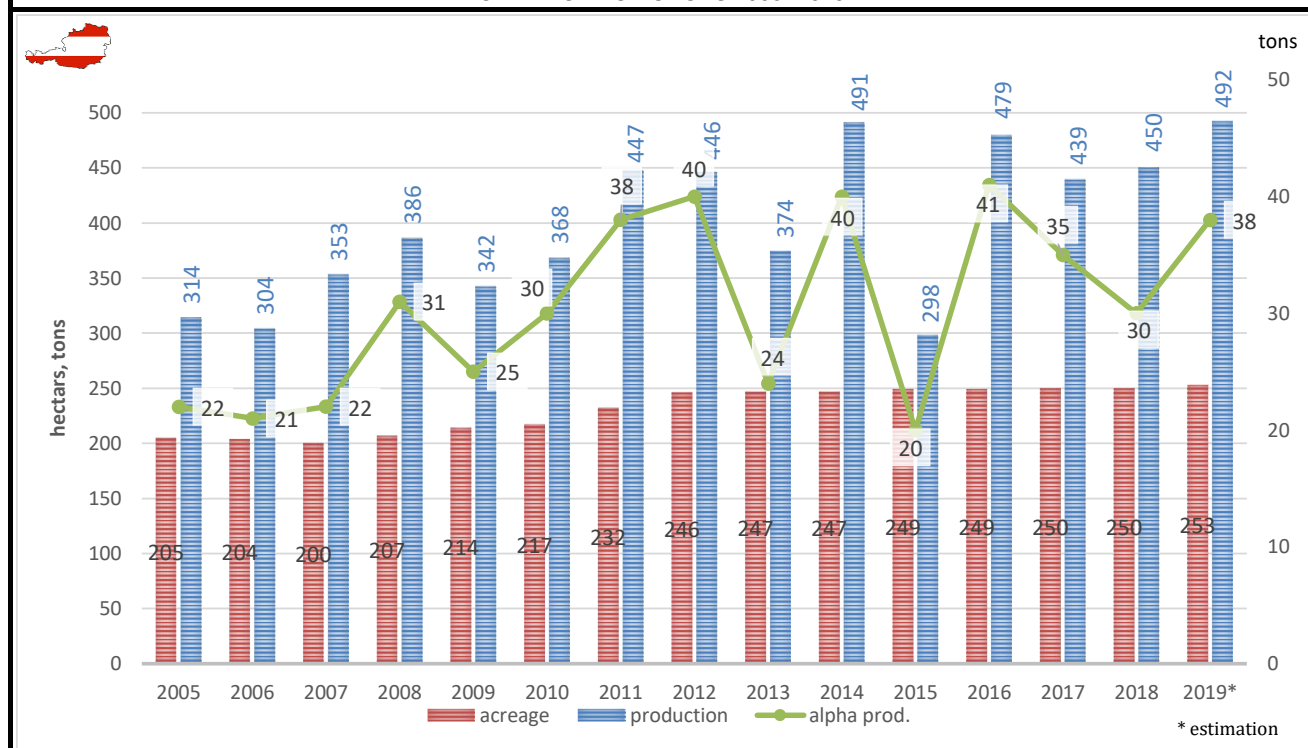
**Austria**

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	471	410	380	200	175	100
% Crop / Year N	94	92	80	40		

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

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)	11,7	12,3
O-Production (MT)	14,0	18,0

### Main O-varieties

Perle Spalter Sele Tradition  
Aurora Malling Cascade



# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

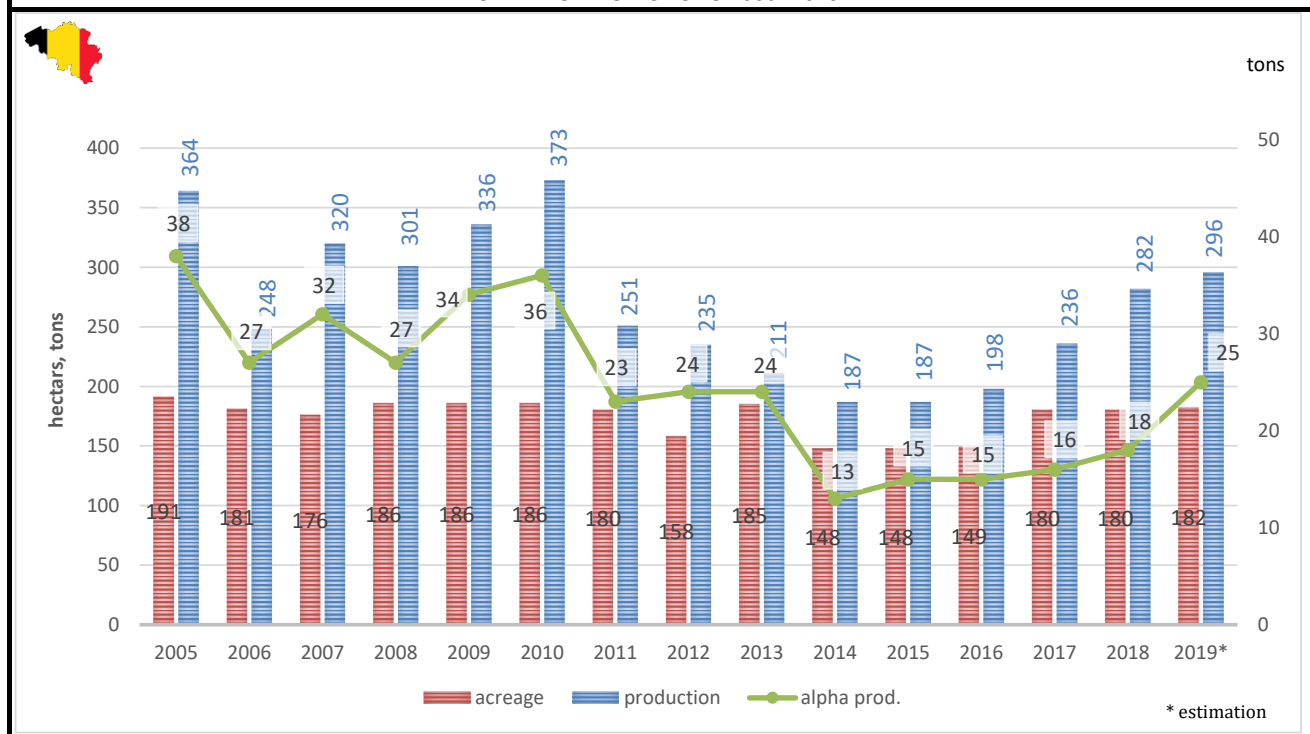
Country: <b>Belgium</b>
----------------------------

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>					

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	Main O-varieties Golding Pilgrim WGV Challenger
O-Production (MT)	17,0	20,0	

Country, Date:  
Belgium

07.11.2019

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





# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

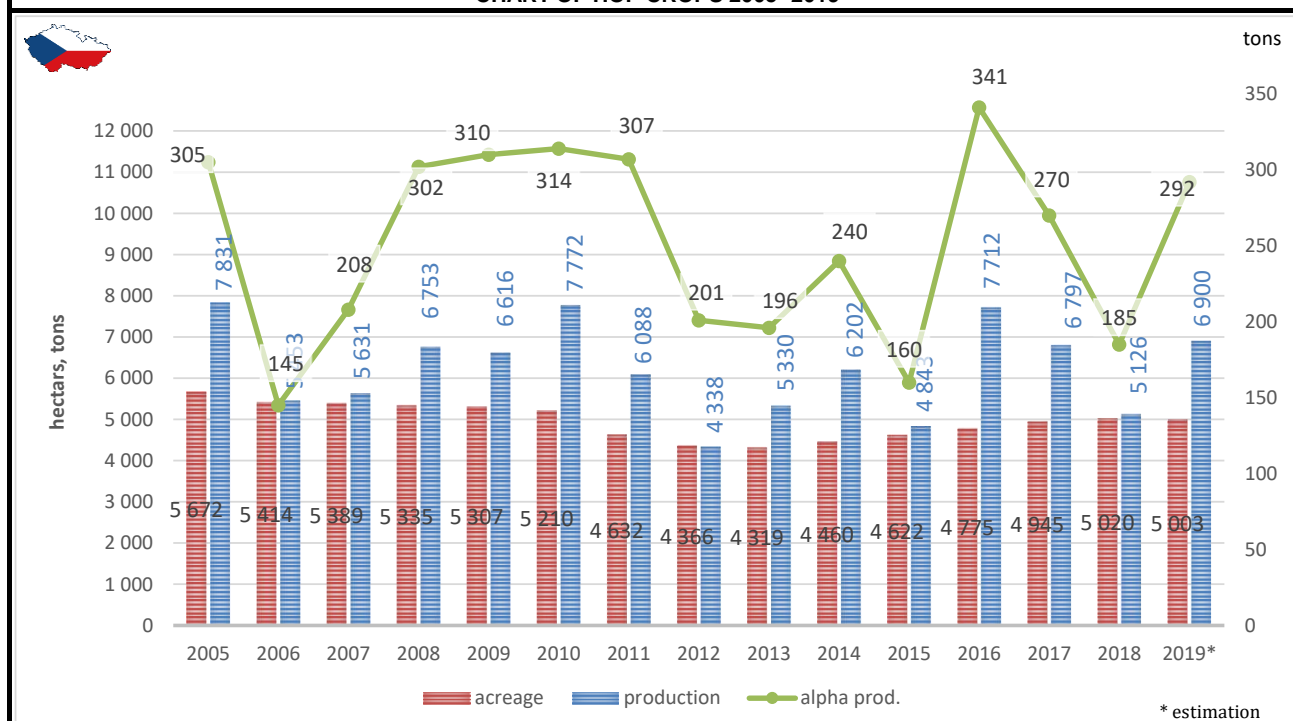
Country:  
**Czech Republic**

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	99	85	80	65

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	12,00

Main O-varieties  
Saaz  
Premiant

Country, Date:  
31.10.2019

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



# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

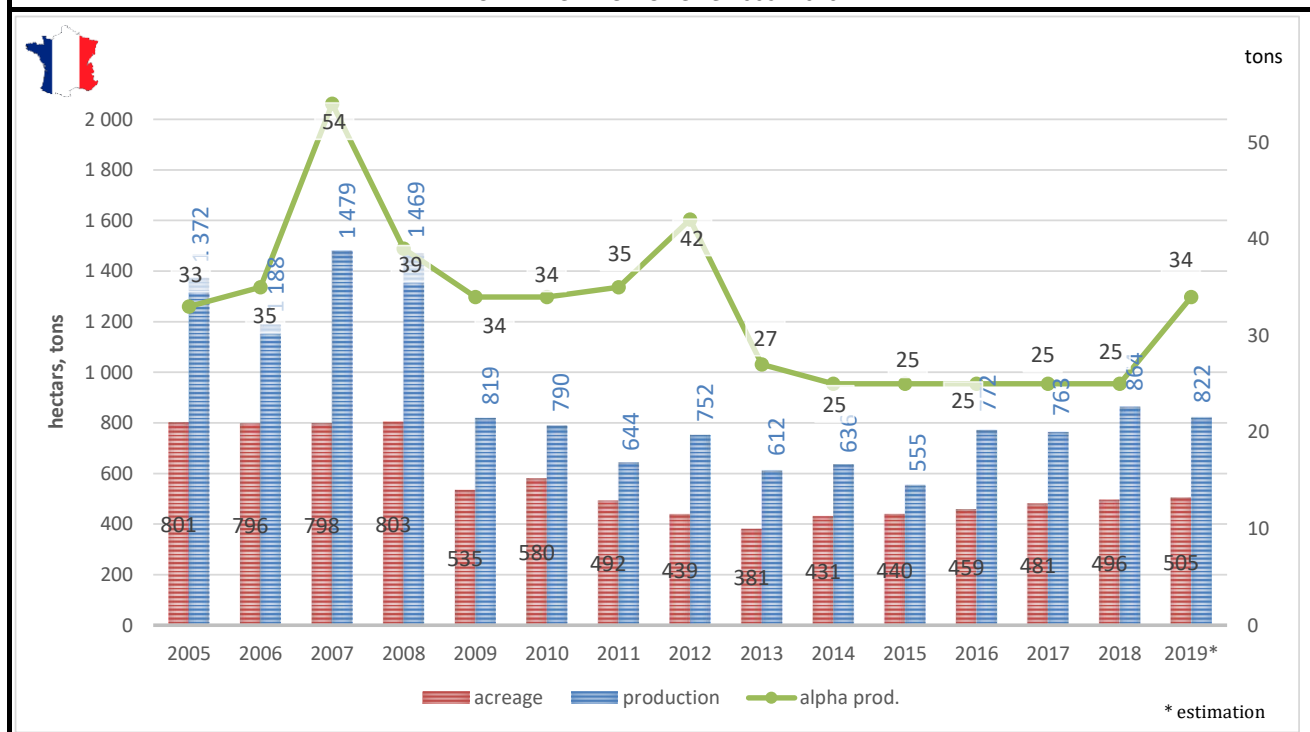
Country: <b>France</b>
---------------------------

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	Main O-varieties
O-Hop Area (Ha)	19,2	19,2	
O-Production (MT)	28,10	28,00	

Country, Date:

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

# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

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	22 500	2 446	12,2
Alpha	21 740	25 900	4 160	19,1
Total	41 794	48 400	6 606	15,8

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,8	2,0	11,7
Alpha	2,4	2,8	16,3
Total	2,1	2,4	14,3

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	5,3	240	0,5
Alpha	3 040	14,0	4 000	15,4	960	1,5
Total	4 000	9,6	5 200	10,7	1 200	1,2

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	6,7	1,2
Hall.Tradition	2 712	2 770	58	5	5,4	0,4
Hersbrucker	924	918	-6	2	2,5	0,5
Hallertauer	687	678	-9	3,6	4,1	0,5
Tettnanger	750	732	-18	3	3,8	0,8
Spalter Select	578	611	33	3,5	4,4	0,9
Saphir	515	492	-23	3,3	3,3	0
Mand. Bavaria	321	298	-23	7,5	7,9	0,4
North. Brewer	293	279	-14	7,4	8,1	0,7
Amarillo	300	206	-94			
Spalter	120	118	-2	3,5	3,9	0,4
<b>Alpha</b>						
Herkules	6 309	6 554	245	14,6	16,2	1,6
Hall. Magnum	1 992	1 954	-38	11,6	12,3	0,7
Hall.Taurus	258	228	-30	13,6	16,1	2,5
Nugget	128	123	-5	10,1	10,6	0,5
Polaris	225	275	50	18,4	19,4	1,0

# International Hop Growers' Convention

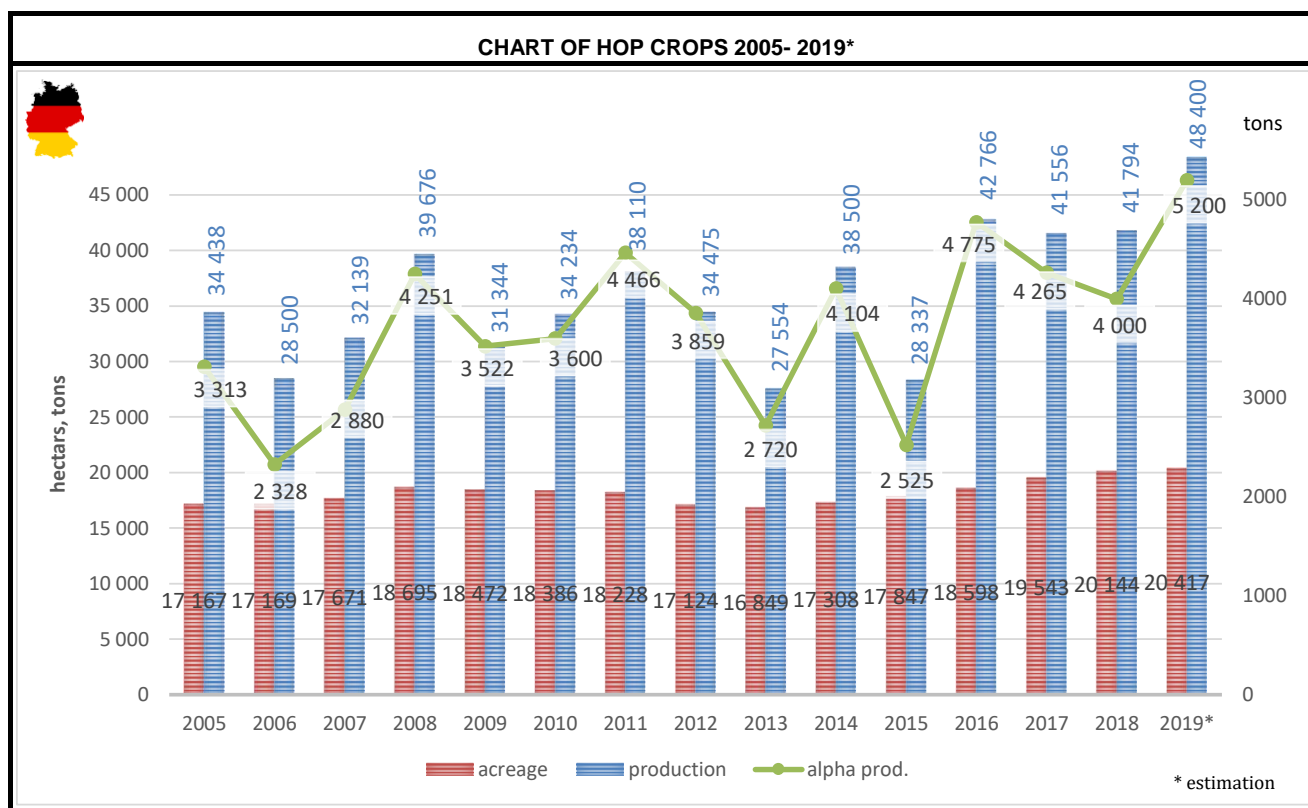
IHGC-Economic Committee: November 2019 - Nuremberg, Germany

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	89	89	78	74	62	49

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				0,00
% 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	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>	<b>5,4</b>	<b>5,58</b>		<b>3,30</b>	<b>Farmer Price</b>



## 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

06.11.2019

Verband deutscher Hopfenpflanzer  
gez. Brunner

# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

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	310,5	315,5	5	7,1		
Lubelski	404,5	409,5	5	2,1		
Lomik	2,7	2,7	0			
Perle	44,1	44,1	0	4,6		
Sybilla	109,5	109,5	0	3,0		
H. Tradition	61,3	61,3	0	3,5		
Pulawski	6,5	6,5	0			
Triskel	1,4	1,4	0	2,95		
Saaz	2,5	2,5	0	2,65		
Cascade	11,4	11,4	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	125,9	130,9	5	11,9		
Izabella	0,4	0,4	0			
Iunga	12,0	12,0	0			
Chinook	2,2	2,2	0			
Zula	1,2	1,2	0			
New varieties plants	1,0	1,0	0			
Taurus	3,7	3,7	0			
Oktawia	2,2	2,2	0			

# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

Country:

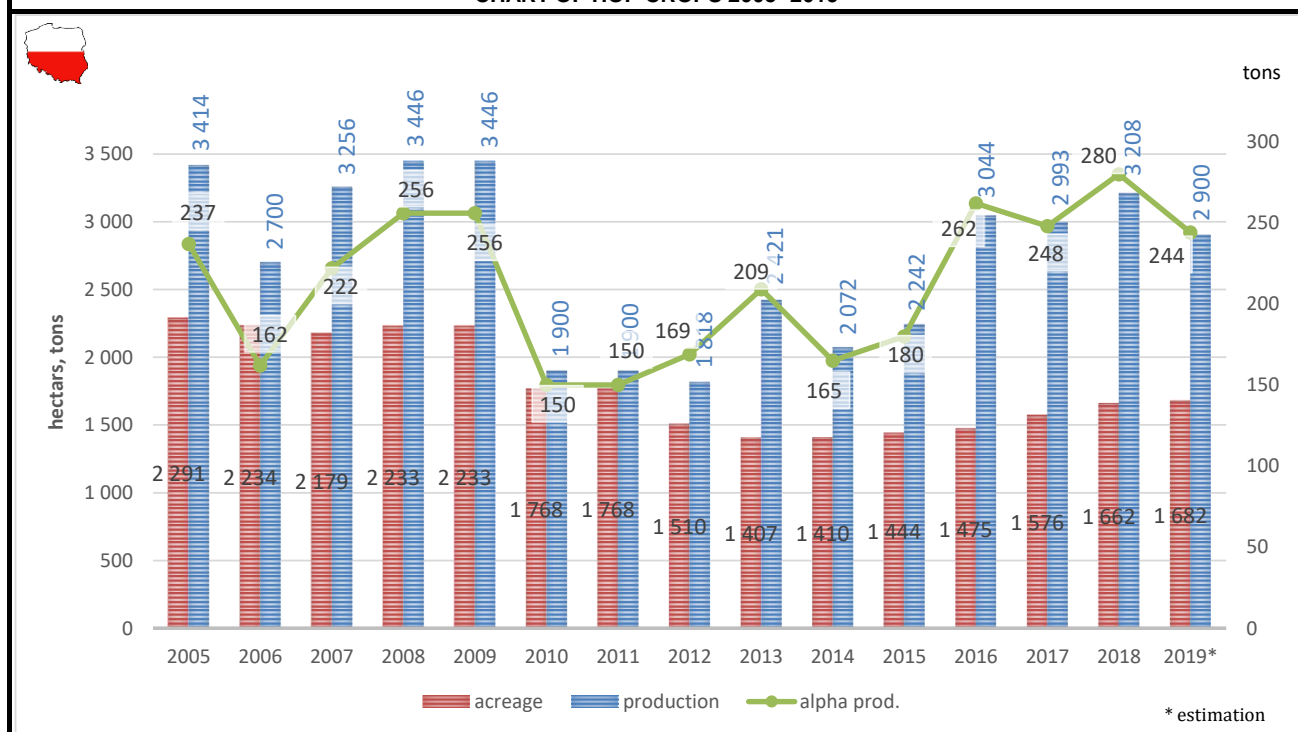
**Poland**

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>	5,06	4,83	-	-	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)	9,0	11,0

### Main O-varieties

HMG            MAR            PUL  
MGN            CAS

Country, Date: Poland, 5.11.2019

Member Organization(s):  
Jan Szalas





# International Hop Growers' Convention

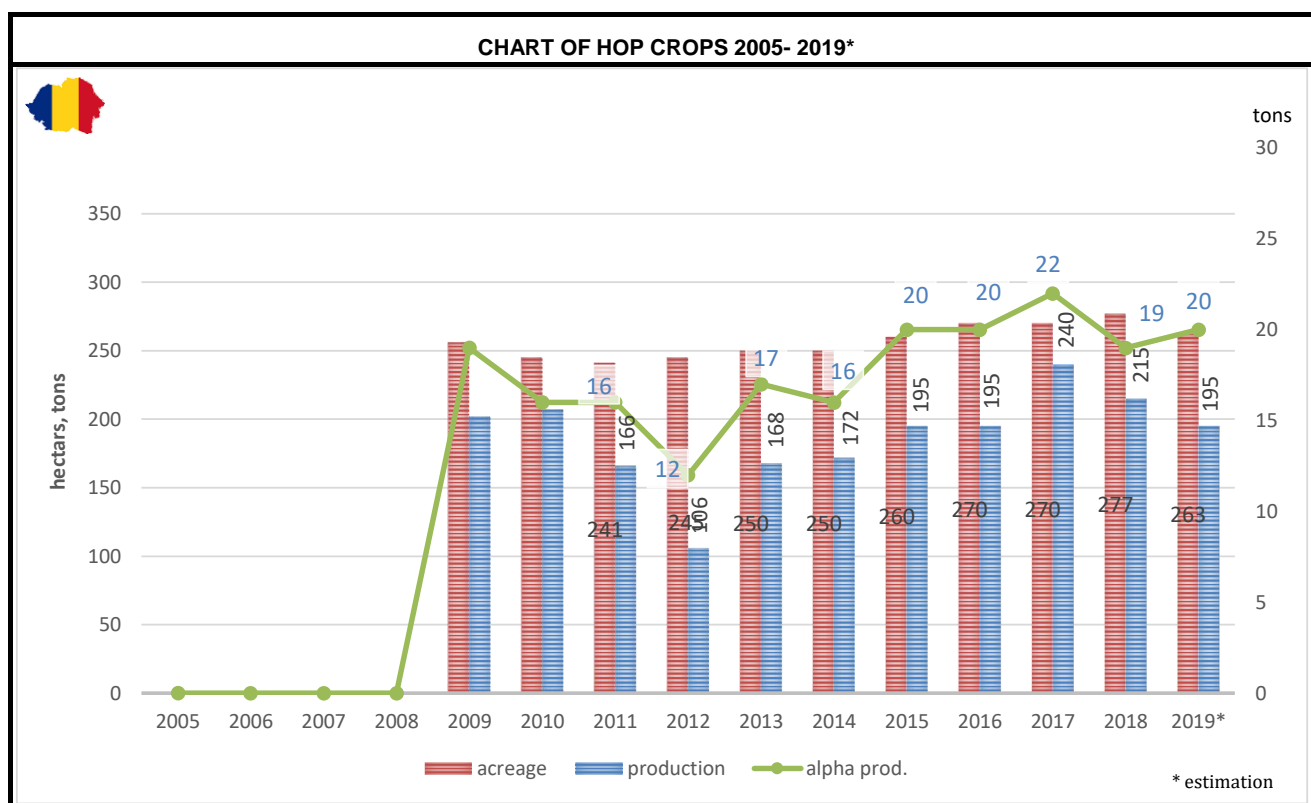
IHGC-Economic Committee: November 2019 - Nuremberg, Germany

Country:  
**Romania**

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	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>					



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

In the 2019 June 24 we had a hailstorm damage 41 ha area and dryness on may,junie.  
The production are desceased 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:  
30 october 2019

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



# International Hop Growers' Convention

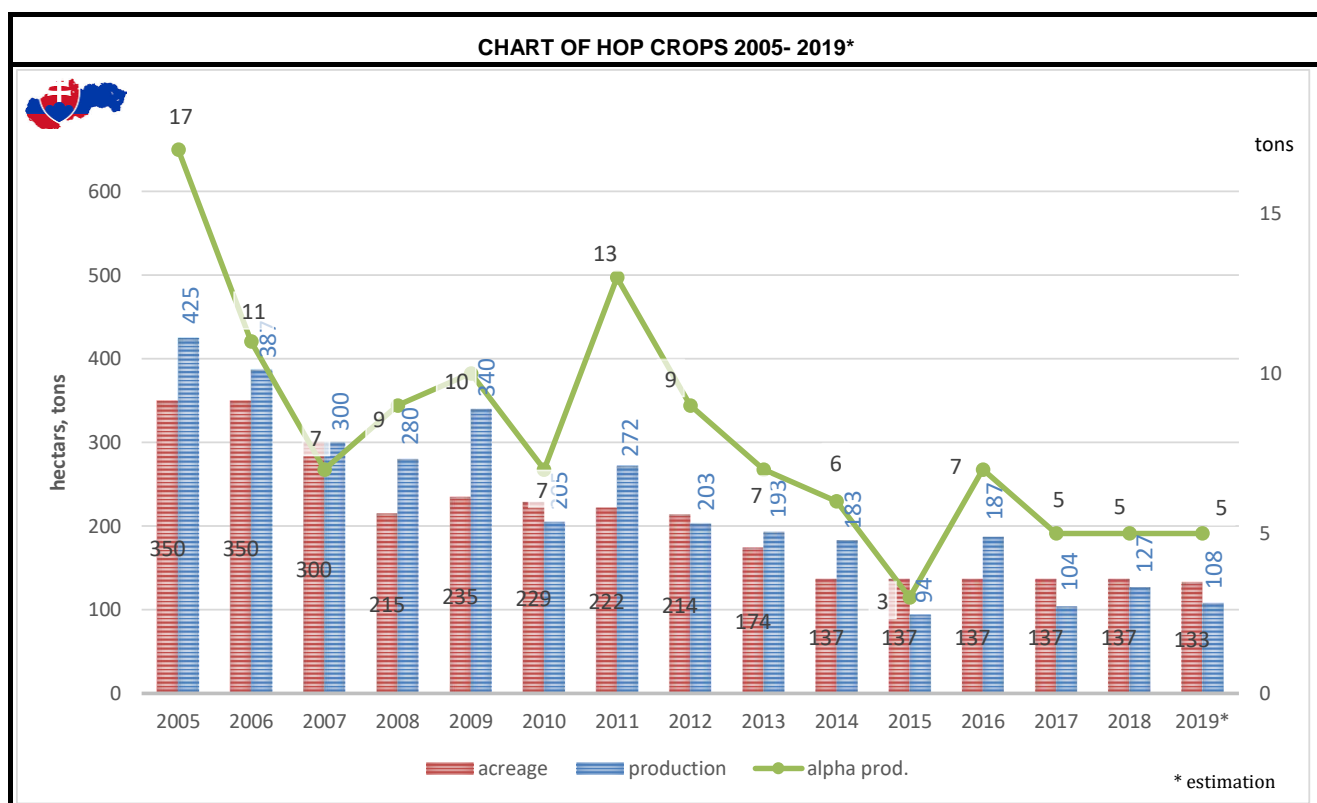
IHGC-Economic Committee: November 2019 - Nuremberg, Germany

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	7	7,05		
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:  
06.11.2019

Member Organization(s):  
Slovchmel' družstvo



# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

Country:

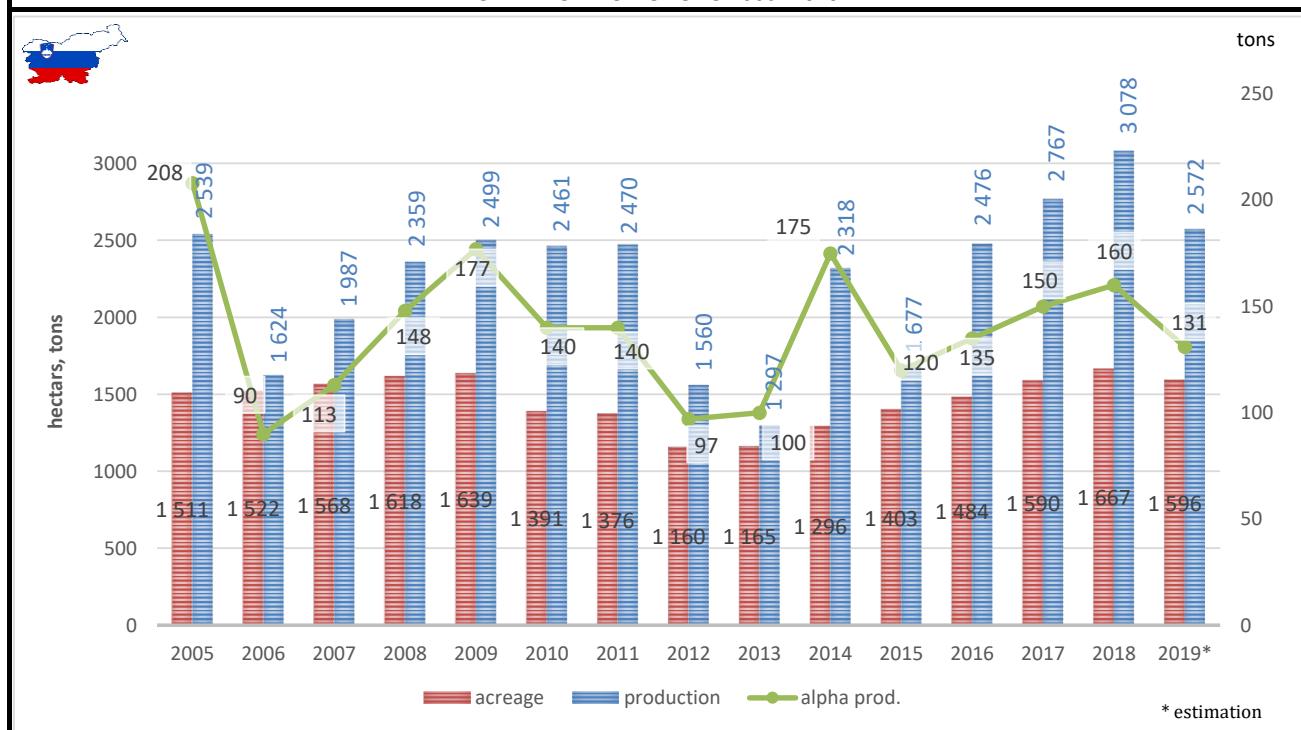
**Slovenia**

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	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>					

CHART OF HOP CROPS 2005- 2019\*



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

There was a sufficient amount of precipitation. Due to hail storms in June and July, the yields in the affected field were reduced. The overall crop is average.

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

Main O-varieties  
Styrian Gold

Country, Date:  
Slovenia, November 4, 2019

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



# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

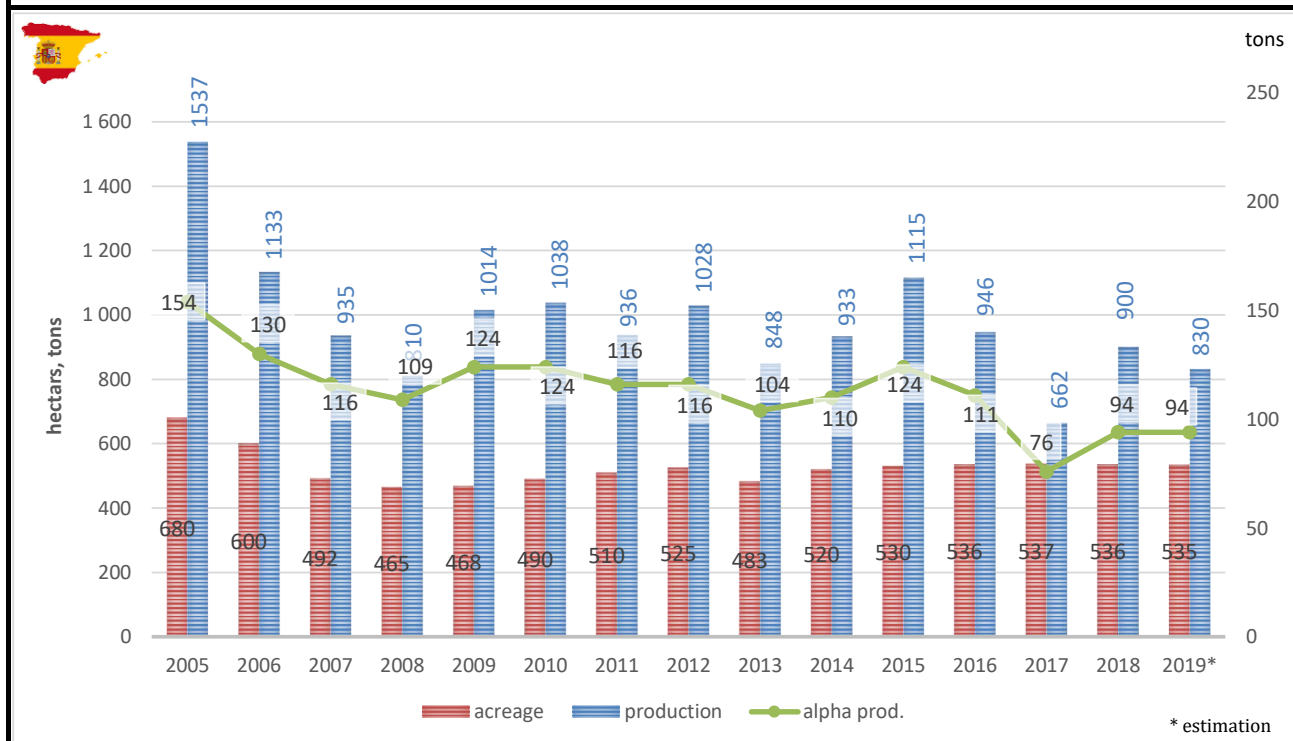
Country:  
**Spain**

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	Main O-varieties
O-Hop Area (Ha)			
O-Production (MT)			

Country, Date:

Carrizo, 6 Noviembre 2019

Member Organization(s):

A.P.A. 001  
S.A.T. nº 6 504

# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

Country:

**UK**

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	779	787	8	1,0
Alpha	169	171	2	1,2
Total	948	958	10	1,1

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	779	787	8	1,0
Alpha	169	171	2	1,2
Total	948	958	10	1,1

Production MT=Metric Tons	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	1 050	1 353	303	28,8
Alpha	327	343	16	4,9
Total	1 377	1 696	319	23,2

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,35	1,72	27,5
Alpha	1,93	2,01	3,7
Total	1,45	1,77	21,9

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	1 050	5,5	1 353	6,01	303	28,9
Alpha	327	11,0	343	11,17	16	4,9
Total	1 377		1 696		319	23,2

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>						
Bramling Cross	101	101	0	7,0	6,50	
Challenger	149	149	0	5,4	7,00	
First Gold	197	197	0	8,0	8,00	
Fuggles	220	220	0	4,5	5,50	
*Goldings	603	603	0	4,3	4,90	
Progress	200	200	0	5,0	6,00	
Sovereign	100	100	0	5,0	4,50	
WGV	87	87	0	4,7	5,70	
<b>Alpha</b>						
Admiral	73	73	0	13,9	13,72	
Pilgrim	184	184	0	10,0	10,77	
Target	165	165	0	11	10,65	

\* Note includes EK Golding, Goldings and Kent Goldings



# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

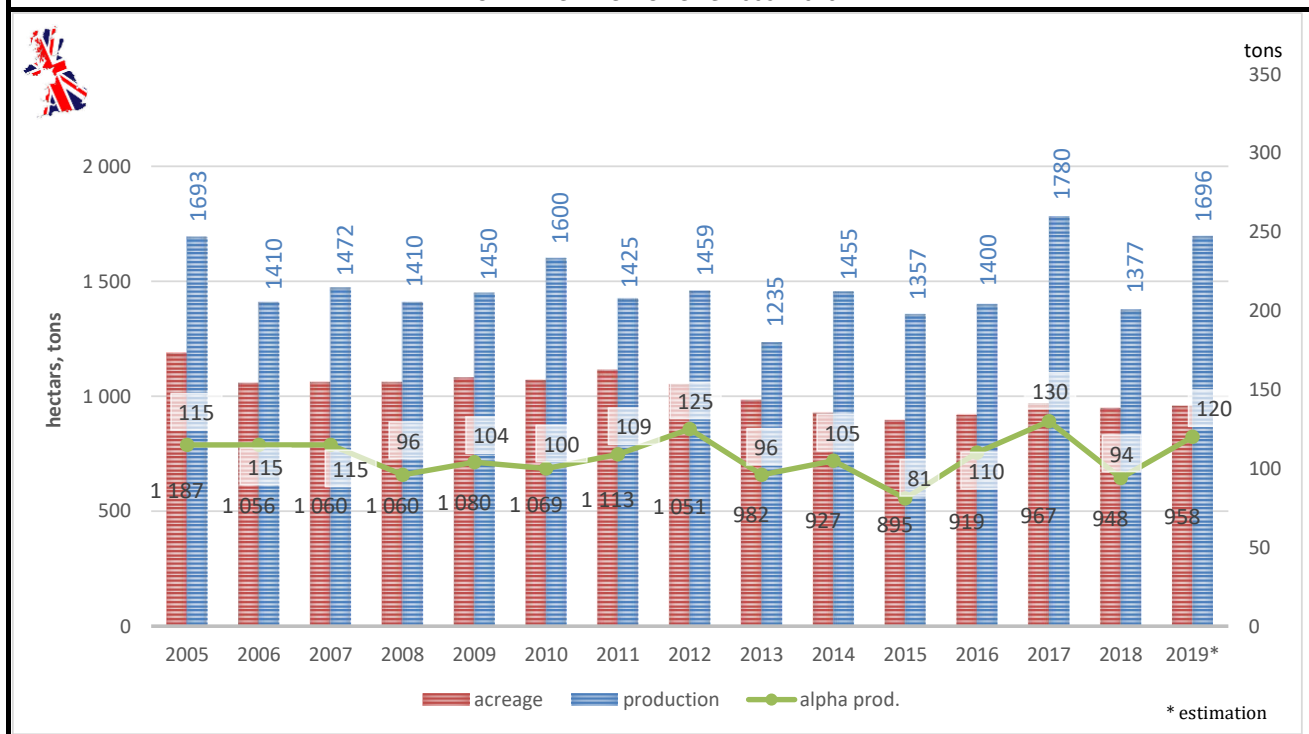
Country: <b>UK</b>
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Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N						

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

CHART OF HOP CROPS 2005- 2019\*



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

	Year N-1	Year N 2019	Main O-varieties First Gold
O-Hop Area (Ha)	4,6	4,6	
O-Production (MT)	3,60	1,80	

Country, Date:  
01.11.2019

Member Organization(s):  
**The British Hop Association**

# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

Country:

**USA**

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 423	18 489	1 066	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	1 066	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	35 414	2 142	6,4
Alpha	15 901	14 190	-1 711	-10,8
Total	49 173	49 604	431	0,9

Yield MT/Ha	Year N-1 2018	Year N 2019 (estimate)	Difference %
Aroma	1,91	1,92	0,3
Alpha	2,67	2,50	-6,3
Total	2,10	2,05	-2,4

Alpha Prod. Metric Tons	Year N-1 Metric Tons	2018 Av. Contents EBC %	Year N Metric Tons (estimate)	2019 Av. Contents EBC %	Difference Metric Tons	N-(N-1) Av. Contents %
Aroma	3 161	9,5%	2 444	6,90%	-717,0	-22,7
Alpha	2 433	15,3%	2 285	16,10%	-148,0	-6,1
Total	5 594	11,4%	4 728	9,53%	-866,0	-15,5

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>				9,50%	6,90%	
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	1 073			
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%	16,10%	
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	97	-1			
<b>Total Alpha</b>	5 956	5 675	-281			

# International Hop Growers' Convention

IHGC-Economic Committee: November 2019 - Nuremberg, Germany

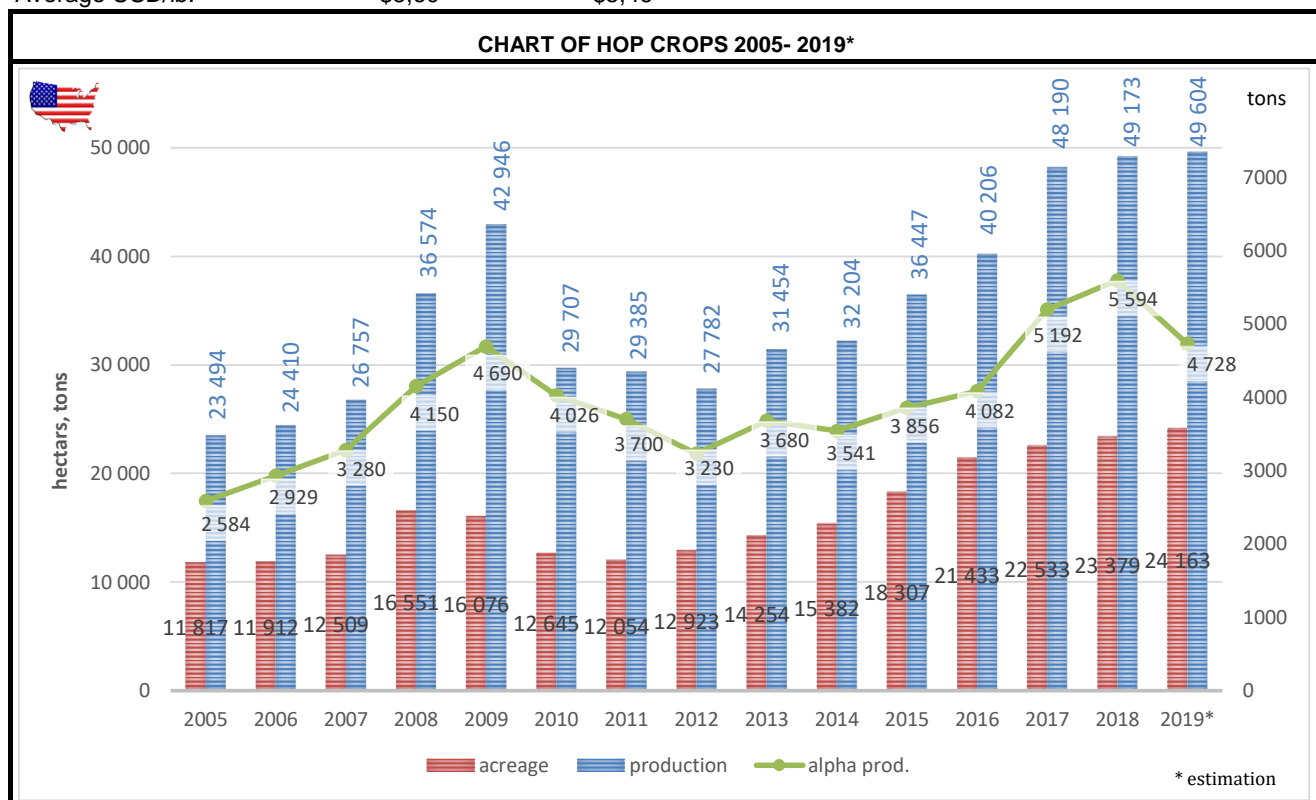
Country: <b>USA</b>
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Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2019	2020	2021	2022	2023	2024
Metric tons						
% Crop / Year N	98%	95%	80%	60%	40%	25%

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>	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

X.19

Member Organization(s):  
Hop Growers of America