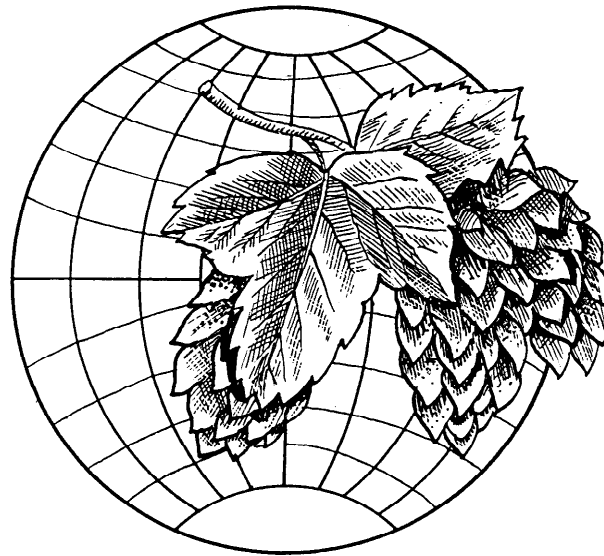


INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

BAD GÖGGING, GERMANY

JULY, 2015



International Hop Growers' Convention

IHGC - Economic Commission Summary Reports

Bad Gögging, Germany - July, 27, 2015

Country	Hop Acreage 2014 (Hectares, Ha)					Hop Production 2014 (in MT = 1.000 kg)				Alpha acid Prod. MT	Hop Acreage 2015 (Hectares, Ha) estimations					Hop Production 2015 (in MT = 1.000 kg) estimations				Alpha acid Prod. MT
	Aroma	Alpha	Hop area'	New	Total	Aroma	Alpha	Total	Aroma		Alpha	Hop area'	New	Total	Aroma	Alpha	Total	MT		
Australia*	64	344	408	0	408	200	879	1 079	140	88	400	488	0	488	200	1 001	1 201	150		
Austria	186	58	244	3	247	385	106	491	40	187	58	245	4	249	340	116	456	39		
Belgium	77	71	148	0	148	87	99	187	13	83	65	148	6	148	117	117	234	15		
China*	300	2 350	2 650	0	2 650	300	5 400	6 900	483	250	2 050	2 300	0	2 300	300	5 700	6 000	440		
Czech Republic	4 007	47	4 054	406	4 460	6 117	85	6 202	240	4 152	42	4 194	423	4 617	5 420	80	5 500	190		
France	327	53	380	80	431	530	106	636	25	364	49	413	31	440	648	70	718	29		
Germany	9 199	6 900	16 099	1 209	17 308	19 409	19 091	38 500	4 104	9 675	7 019	16 694	1 153	17 847	16 500	16 000	32 500	3 400		
New Zealand	288	82	370	0	370	587	178	765	74	328	60	388	0	388	600	140	740	70		
Poland	507	798	1 305	106	1 410	784	1 288	2 072	165	604	820	1 424	76	1 424	1 000	1 452	2 452	195		
Romania	63	182	245	5	250	61	111	172	16	63	187	250	0	250	64	200	264	26		
Russia°	84	54	138	20	158	92	70	162	9	84	54	138	20	158	92	70	162	9		
Serbia°	34	33	67	12	79	58	76	134	11	34	33	67	12	79	58	76	134	11		
Slovakia	137	0	137	0	137	183	0	183	6	137	0	137	0	137	124	0	124	5		
Slovenia	1 104	36	1 140	157	1 296	2 248	70	2 318	175	1 203	25	1 228	175	1 403	1 930	70	2 000	155		
South Africa°	0	420	420	0	420	0	820	820	108	0	420	420	0	420	0	820	820	108		
Spain	0	520	520	0	520	0	933	933	110	0	534	534	0	534	0	950	950	110		
Ukraine°	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30		
UK-England	795	256	1 051	0	1 051	1 000	455	1 455	105	700	220	920	20	920	900	400	1 300	100		
USA	10 000	5 382	15 382	0	15 382	17 567	14 637	32 204	3 541	13 653	4 654	18 307	2 925	18 307	21 572	12 287	33 858	3 647		
IHGC	27 481	17 646	45 127	1 998	47 094	50 008	44 484	95 693	9 395	31 914	16 750	48 664	4 845	50 478	50 265	39 629	89 893	8 729		

° Since no country updates were available, figures from Paris 2015 were used.

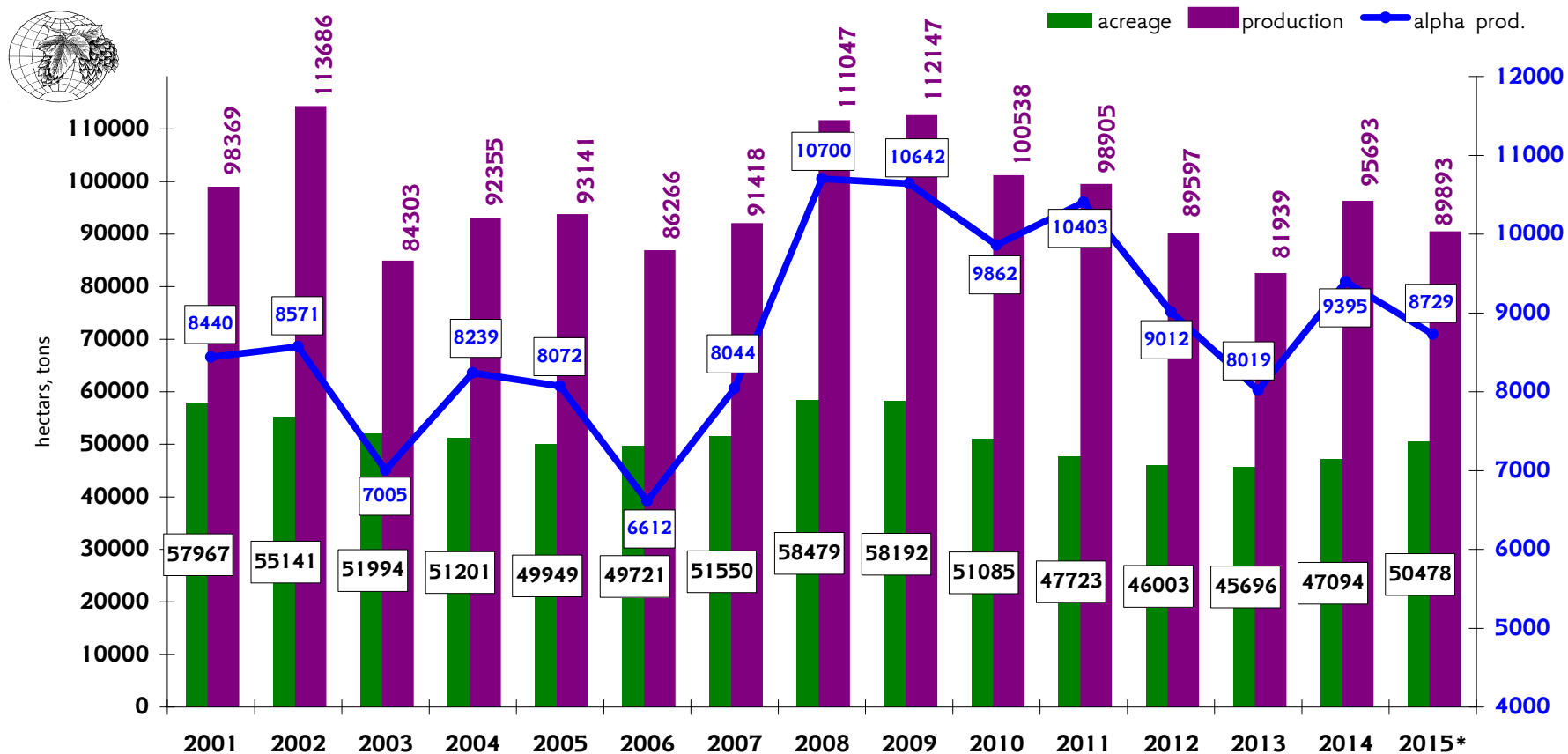
' Acreage without new hop areas

* IHGC estimation

Difference Σ 2015-2014 4 433 -896 3 537 2 847 **3 384** 257 -4 855 **-5 800** **-666**

Figure 1: Comparison of IHGC crops 2001 - 2015* (acreage, production, alpha acids production)

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	57967	55141	51994	51201	49949	49721	51550	58479	58192	51085	47723	46003	45696	47094	50478
production	98369	113686	84303	92355	93141	86266	91418	111047	112147	100538	98905	89597	81939	95693	89893
alpha prod.	8440	8571	7005	8239	8072	6612	8044	10700	10642	9862	10403	9012	8019	9395	8729



* estimation

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

Austria

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	25,4	6,6	22,4	6,6	-3,0	-11,7
Alpha	14,8	14,0	16,2	14,0	1,4	9,4
Total	40,3		38,7			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons	420	395	370			
% Crop / Year N	92	92	85			

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops		6,5			
Alpha Hops		3,9			
Average Price					
Contract Prices					
Aroma Hops	6,3	6,5	6,5	0	Erzeugerpreis / kg RH
Alpha Hops	6,3	7,2	7	-2,8	Erzeugerpreis / kg RH
Average Price	6,3				
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: 16.7.2015

Member Organization:

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country: Belgium

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma			4,7			
Alpha			10,0			
Total			14,7			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	50%	40%	30%	10%	-	-

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

The cold spring, followed by drought and the last weeks very hot temperature, makes that the hop is starting up early to bloom
Consequently, she will not grow into a normal harvest.
The demand for aroma hops is higher than normal.

Country, Date:
Belgium 20/07/2015

Member Organization(s):
Eurohop, Eric Lagache

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country: Czech Republic

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	231,0	3,9	180,0			
Alpha	9,0	11,0	10,0			
Total	240,0	4,01	190,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	100	100	100	95	85	80

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops	6,5	6,5			farmer price
Alpha Hops	4	4			farmer price
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
20.7.2015

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

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

France

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	327	364	37	111,3%
Alpha	53	49	-4	92,5%
Total	380	413	33	108,7%

New Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)
Aroma	80	31
Alpha	-	-
Total	80	31

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	378	405	27	107,1%
Alpha	53	35	-18	66,0%
Total	431	440	9	102,1%

Production MT=Metric Tons	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	530	648	118	122,3%
Alpha	106	70	-36	66,0%
Total	636	718	82	112,9%

Yield MT/Ha	Year N-1 2014	Year N 2015 (estimate)	Difference %
Aroma	1,6	1,6	1,0
Alpha	2,0	2,0	1,0
Total	1,7	1,7	1,0

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)
Aroma						
Strisselspalt	180	182	2	1,70		
Aramis	47	46	-1	6,10		
Tradition	35	32	-3	3,80		
Triskel	22	21	-1	3,30		
Fuggle	31	38	7	4,60		
Golding	32	37	5	2,70		
Challenger	6	6	0	6,00		
Barbe-Rouge		2	2	8,40		
GS26	1	5	4	8,90		
Alpha						
Columbus	11	9,3	-1,7	7,70		
Brewers Gold	10,8	10,8	0	4,20		
Nugget	21	16	-5	8,50		
Magnum	5	5	0	11,60		
Target	5	5	0	9,40		

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

France

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	17,2	3,2	19,0	3,2	1,8	1,1
Alpha	7,8	7,4	9,6	10,0	1,8	1,2
Total	25,0	3,9	28,6	4,1	3,6	1,1

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	75	70	60	55	45	45

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production		530	106	636
- Sold Production		530	106	636
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	4	6,5	7		
Alpha Hops	1,6	3	4		
Average Price					
Contract Prices					
Aroma Hops	5	5,5/6	6,5		
Alpha Hops		3	3,5		
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
July 7, 2015

Member Organization(s):
AGPH
Francis Heitz

International Hop Growers' Convention

IHGC-Economic Commission: July 2015 - Bad Gögging, Germany

Country:

Germany

Hop area (ha)	Year N-1 2014	Year N 2015	Difference N - (N-1)	Difference %
Aroma	9199	9675	476	5,2
Alpha	6900	7019	119	1,7
Total	16099	16694	595	3,7

New Hop Area (ha)	Year N-1 2014	Year N 2015
Aroma	677	656
Alpha	532	497
Total	1209	1153

TOTAL Hop area (ha)	Year N-1 2014	Year N 2015	Difference N - (N-1)	Difference %
Aroma	9876	10331	455	4,6
Alpha	7432	7516	84	1,1
Total	17308	17847	539	3,1

Production MT	Year N-1 2014	Year N 2015 estimate	Difference N - (N-1)	Difference %
Aroma	19 409	16 500	-2 909	-15,0
Alpha	19 091	16 000	-3 091	-16,2
Total	38 500	32 500	-6 000	-15,6

Yield MT/HA.	Year N-1 2014	Year N 2015 estimate	Difference %
Aroma	2,0	1,6	-18,7
Alpha	2,6	2,1	-17,1
Total	2,2	1,8	-18,1

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)
Aroma						
Perle	3154	3187	33	8	7,8	-0,2
Hall.Tradition	2825	2914	89	5,8	6,3	0,5
Hersbrucker	924	954	30	2,1	3	0,9
Hallertauer	838	746	-92	4,2	4,2	0
Tettnanger	762	744	-18	4,1	4	-0,1
Spalter Select	523	533	10	4,7	5,1	0,4
Saphir	381	423	42	3,9	4,1	0,2
Spalter	112	113	1	3,4	3,8	0,4
Mand. Bavaria	99	207	108			0
Alpha						
Herkules	3622	4152	530	17,5	17	-0,5
Hall. Magnum	2642	2353	-289	12,6	13,6	1
Hall.Taurus	594	465	-129	17,4	16,7	-0,7
North. Brewer	267	238	-29	9,7	9,4	-0,3
Nugget	173	162	-11	9,9	11,2	1,3
Polaris	53	60	7			0
Hall. Merkur	31	26	-5			0
Brewers Gold	17	17	0			0
Comet	3	5	2			0

International Hop Growers' Convention

IHGC-Economic Commission: July 2015 - Bad Gögging, Germany

Country: Germany

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	estimate	%		%
Aroma	1126,0	5,8	900,0	5,5	-226,0	-0,3
Alpha	2978,0	15,6	2500,0	15,6	-478,0	0,0
Total	4 104	10,7	3400,0	10,5	-704,0	-0,2

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric Tons	29744	29738	28035	26602	20654	18295
% Crop / Year N	92	92	86	82	64	56

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production		19409,00	19 091	38 500
- Sold Production		19409,00	19 091	38 500
= Unsold Hops		0,00	0,00	0,00
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2012	Year (N-1) 2014	Year (N) 2015	% Diff. 2014 vs. 2013	Kind of Price
Spot Prices					
<i>Aroma Hops</i>	4,4	5,61		27,50	Farmer Price
<i>Alpha Hops</i>	2,66	4,25		59,80	Farmer Price
Average Price	3,18	4,78		50,30	Farmer Price
Contract Prices					
<i>Aroma Hops</i>	4,56	4,8		5,30	Farmer Price
<i>Alpha Hops</i>	4,13	4,05		-1,90	Farmer Price
Average Price	4,33	4,45		2,80	Farmer Price
Average Prices					
<i>Aroma Hops</i>	4,53	4,94		9,10	Farmer Price
<i>Alpha Hops</i>	3,87	4,1		5,90	Farmer Price
AVERAGE	4,16	4,52		8,70	Farmer Price

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Germany

21.7.2015

Verband deutscher Hopfenpflanzer

gez. Brunner

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country: New Zealand

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(actual)	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production	740	600	140	
- Sold Production	703	570	133	
= Unsold Hops	37	30	7	
% unsold Hops	5			

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					Market
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Production situation:

Production remains focussed on increasing aroma varieties and decreasing alpha varieties. The harvest was completed by the end of March with what was at best considered an average crop with decreases in Wakatu variety and increases in Nelson Savin, Motueka and aroma types. New Zealand grows 23 varieties 13 of which are unique to New Zealand with 6 also grown as certified organic. (12.5 Ha) New Zealand remains hop disease free with an certified spray free crop. Production remains static through the process of switching varieties from high yielding alpha and dual purpose to lower yielding aroma specialty types.

Market Conditions:

International market conditions remain favourable for New Zealand Hops entering 2015 harvest with a 95 % sold forward position. The industry expectation is that the complete crop will be sold prior to the 2016 harvest. Only small volumes of surplus and available spots remain.



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Media Release

New Zealand Hop Harvest 2015

The New Zealand Hop harvest commenced this season with the traditional northern types of Fuggle and Styrian Golding arriving into store in the second week of February. Early New Zealand varieties such as Pacifica and Motueka commenced soon after with all picking operations in full swing by the start of March and concluding with the final bales of the later varieties Rakau and Green bullet weighed across into cold storage by early April.

During the growing season the spring was unseasonably cold, especially the overnight temperatures, which held the plants back considerably and slowed development until well into November. The regions famous summer finally arrived with the New Year and it persisted solidly throughout, right up till and into April. It brought with it long sunny days with plenty of heat units all interspersed with good levels of warm coastal rain.

By the time harvest arrived most of the districts plants had developed into what appeared to be an above average crop but one that finished only slightly ahead of grower production estimates. The weather conditions during harvest were for the most part ideal, although some severe northerly winds and torrential rains did occur mid-point as part of the aftermath of category 5 tropical cyclone Pam which did impact harvesting in some gardens.

Main Harvest Points:

- Farm structure for the 2015 harvest remained at 17 grower / shareholders (including a joint venture) all supplying hops through the cooperatively owned company of New Zealand Hops Limited.
- Cultivation continues to be dominated by designated aroma/flavour varieties at 328 Hectares while Alpha designated production continued to fall to 60 Hectares. An overall total of 389 Hectares was harvested which is an increase of 19 hectares from the 2014 harvest (370 Ha)
- Total volume harvested was 739,620 kilograms (Table # 1) which is a decrease of 24, 949 kilograms on the 2014 harvest (764,569 kg). Aroma / flavour designated hops accounted for 605,668 kilograms with alpha designated varieties at 133,952 kilograms.
- The average alpha acid was 9.5 % with the highest commercial variety being Waimea at 15 .5 % and the lowest being Wai-iti at 3.1 %.
- Selections and grade standard assessments scored well above the average with growers delivering hops of an exceptional standard...5,948 bales were received into the New Zealand Hops Limited new cold storage facility on Blackbyre Road Appleby.
- A highlight once again of harvest was the industry's green hop programme operated under an expanded model this year which saw NZ Cascade, Motueka and Nelson Sauvín distributed to 35 brewers throughout the main centres and supporting several green hop beer events and seasonal releases.

Market position:

- The 2015 crop was approximately 95 % sold prior to harvest with a post harvest view that the total crop will be sold prior to the 2016 harvest.
- Spot availability continues to be limited under the current market demand for New Zealand Hops and specialty hops in general internationally.
- As has been stated in previous reports acreage will continue to expand against a landscape of sustainable pricing and forward contracts, however as the total international market continues to grow it is unlikely that the New Zealand Industry will advance past its current world crop contribution of less than 1.0 %
- Currently a continued programme on farm of switching out of varieties is seeing modest increases in acreages while volumes remain reasonably static. A point will occur when the variety balance will be met and then both acreage and volume will commence to track upward together.

Industry outlook:

- Research and development will continue to be a major focus of the industry through our research partnership with New Zealand Plant and Food Research. Plant breeding remains at the forefront of the programme and several new selections were identified as “of interest” during this season.
- A pilot brewing plant was also commissioned during the season and several of the new selections have been ear marked for pilot brewing trials through our own system as well as some larger scale trials through commercial partners.
- Identification of hops with unique flavour profiles and brewing characteristics for commercialisation run at the heart of the programme however agronomics such as yield and in particular establishing a broader future picking window are key to our future varietal selections.

Please direct further enquires to nzhops@nzhops.co.nz typing “Media Release” as the subject.

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

Poland

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	506,53			
Alpha	798,27			
Total	1304,8	1347,44	43	3,3

New Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)
Aroma	79,76	
Alpha	25,74	
Total	105,5	76,16

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	586,29	604,42	18	3,1
Alpha	824,01	819,18	-5	-0,6
Total	1410,3	1423,6	13	0,9

Production MT=Metric Tons	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	784,19			
Alpha	1 288,11			
Total	2 072,30	2 452		

Yield MT/Ha	Year N-1 2014	Year N 2015 (estimate)	Difference %
Aroma	1,55	1,70	
Alpha	1,61	1,90	
Total	1,59	1,82	

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)
Aroma						
Lubelski	369,21	383,76	14,55			
Lomik	4,36	4,14	-0,22			
Perle	61,89	61,1	-0,79			
Sybilla	70,75	77,1	6,35			
HT	80,08	77,7	-2,38			
Puławski	0	0,62	0,62			
Alpha						
Marynka	302,29	294,48	-7,81			
Magnum	505,83	495,54	-10,29			
Junga	6,36	7,39	1,03			
Taurus	9,01	8,22	-0,79			
Magnat	0,52	13,55	13,03			

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

Poland

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	31,3	4,00				
Alpha	133,5	10,36				
Total	165,0	7,96				

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production		784,19	1288,11	2072,3
- Sold Production		784,19	1288,11	2072,3
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	4,34				
Alpha Hops	2,77				
Average Price	3,56				
Contract Prices					
Aroma Hops	3,25				
Alpha Hops	2,79				
Average Price	3,02				
Average Prices					
Aroma Hops	3,8				
Alpha Hops	2,78				
AVERAGE	3,29				

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
Poland, 17.07.2015

Member Organization(s):
Polish Hop Growers Association

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

Romania

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	63	0	0	0
Alpha	182	0	0	0
Total	245	0	0	0

New Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)
Aroma	0	0
Alpha	5	0
Total	5	0

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	63	63	0	
Alpha	187	187	0	
Total	250	250	0	

Production MT=Metric Tons	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	61	64	3	4,9
Alpha	111	200	89	80,2
Total	172	264	92	53,5

Yield MT/Ha	Year N-1 2014	Year N 2015 (estimate)	Difference %
Aroma	0,968	1,016	4,9
Alpha	0,594	1,070	80,2
Total	0,688	1,056	53,5

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)
Aroma						
Perle	33	38	5	9,03	9,0	-0,03
Huller Bitter	30	25	-5	7,02	7,0	-0,02
	63	63	0	8,21	8,2	-0,01
Alpha						
H Magnum	69	78	9	11,36	12,50	1,14
H Merkur	29	29	0	10,02	10,00	-0,02
Brewers Gold	89	80	-9	7,50	7,70	0,20
	187	187	0	9,91	10,25	0,34

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country: Romania

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	5,0	8,2	5,2	8,20	0,2	4,8
Alpha	11,0	9,9	20,5	10,25	9,5	86,4
Total	16,0	9,3	25,7	9,75	9,7	60,8

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons	250	260	280	280	280	
% Crop / Year N	95	98	106	106	106	

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production		5	11	16
- Sold Production		5	11	16
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country: Slovakia

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	6,3		5,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

Slovenia

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	175,0					

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	95	80	70			

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices	4,5	5,6	4,5 - 6,0		
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

A demand for aroma hops made some of the growers enlarging their acreage.

Country, Date:
Slovenia, July 17, 2015

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

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

Spain

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha	110,0		110,0			
Total	110,0		110,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons	1.000					
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production			933	933
- Sold Production			933	933
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices	3,8	3,72	3,8		
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices	3,8	3,72	3,8		
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
20/07/2015

Member Organization(s):
AGRUPACION LUPULO SPAIN

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

UK

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	795	700	-95	
Alpha	256	220	-36	
Total				

New Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)
Aroma	-	20
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	795	700		
Alpha	256	220		
Total	1051	920		

Production MT=Metric Tons	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total				

Yield MT/Ha	Year N-1 2014	Year N 2015 (estimate)	Difference %
Aroma			
Alpha			
Total			

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)
Aroma						
Goldings	162	140		4,26		
EK Goldings	92	100		4,92		
1st Gold	109	112		8,11		
Fuggles	97	90		4,88		
Alpha						
Admiral	41	32	-9	14,36		
Target	96	85	-11	10,66		
Pilgrim	86	81	-5	9,95		
Northdown	17	17		7,11		

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

UK

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	100	100	70	60	20	20

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production		-	-	
- Sold Production				
= Unsold Hops				
% unsold Hops		-	-	

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Aroma market strong
Alpha market weak
Increase in plantings of East Kent Goldings

Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

USA

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	10 000	13 653	3 653	36,5%
Alpha	5 382	4 654	-728	-13,5%
Total	15 382	18 307	2 925	19,0%

Includes 505 ha outside of Pacific Northwest

New Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)
Aroma		
Alpha		
Total		

See attached breakdown
for acreage by state and
by variety.

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	10 000	13 653	3 653	36,5%
Alpha	5 382	4 654	-728	-13,5%
Total	15 382	18 307	2 925	19,0%

Production MT=Metric Tons	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 567	21 572	4 005	22,8%
Alpha	14 637	12 287	-2 350	-16,1%
Total	32 204	33 858	1 654	5,1%

Yield MT/Ha	Year N-1 2014	Year N 2015 (estimate)	Difference %
Aroma	1,76	1,58	
Alpha	2,72	2,64	
Total	2,09	1,85	

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)
Aroma/Dual						
ADHA-483 Azacca™	32	73				
ADHA-881 Jarrylo™	30	49				
Cascade	3 090	3 090				
Centennial	1 400	1 930				
Citra® (HBC 394)	735	1 169				
Chinook	720	700				
Cluster	294	275				
El Dorado	33	181				
Mosaic™ (HBC 369)	272	724				
Simcoe® (YCR 14)	744	1 322				
Willamette	475	575				
Alpha						
Apollo	398	402				
Bravo	287	295				
CTZ	2 343	2 160				
Nugget	670	662				
Summit	1 073	685				
Super Galena	367	206				

International Hop Growers' Convention

IHGC-Economic Committee: July 2015 - Bad Gögging, Germany

Country:

USA

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	3 541	10,9	3647,0	10,1		

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	99	98	85	50	40	30

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE	US\$3.35/lb	US\$3.83/lb			
	6.79 Euro/kg	7.77 Euro/kg			

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate \$1 USD = 0.92 Euro (7 April 2015)

Alpha and aroma variety totals are based on the IHGC list of World Hop Varieties. Those varieties classified as "Dual" are included in the Aroma category for consistency. Varieties listed in the "Other" category in the US statistical reports produced by USDA-NASS are included in Aroma. This insures that Dual purpose and Other varieties are classified consistently throughout the year. The USDA statistical reporting system is voluntary, and individual varieties are not reported if three or fewer growers have the variety in each state. Alpha percentages are reported as 10% lower than spectro levels, to be more consistent with EBC results.

Country, Date: 7.15
USA

Member Organization(s):
Hop Growers of America

North American Hop Acreage Estimate

2015 June Strung for Harvest

Prepared by Hop Growers of America

Contact Ann George, 509-453-4749, info@usahops.org

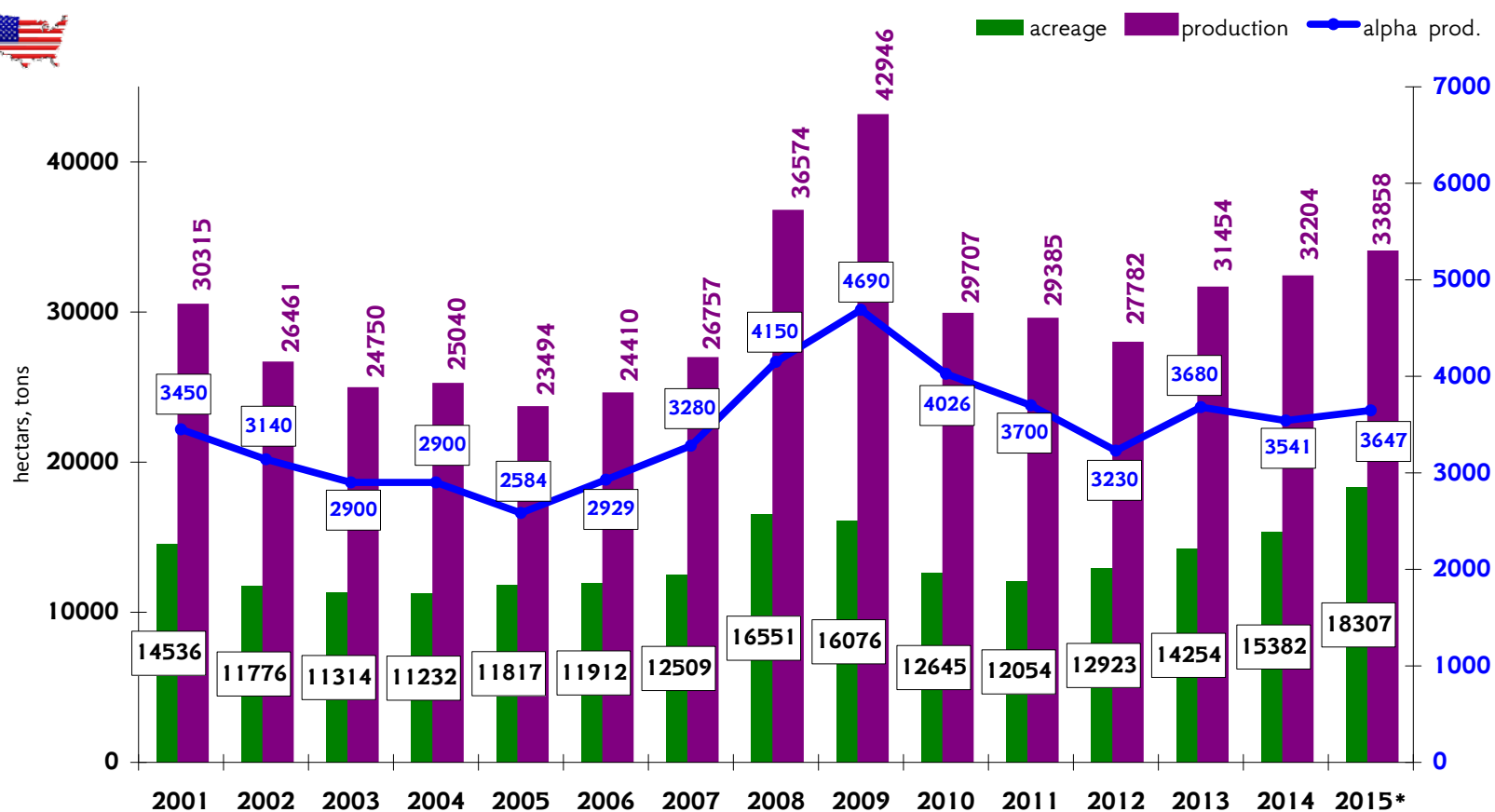
June 12, 2015

STATE/PROVINCE & VARIETY	ACRES STRUNG FOR HARVEST			2014-15
	2014 ac	2015 ac	2015 ha	% +/-
ARIZONA		1.0	0.4	
CALIFORNIA	65.0	85.0	34.4	30.77%
COLORADO	75.0	125.0	50.6	66.67%
IDAHO #				
Apollo	285.0	285.0	115.3	0.00%
Bravo	126.0	166.0	67.2	31.75%
Calypso		81.0	32.8	
Cascade	821.0	772.0	312.4	-5.97%
Centennial	74.0	265.0	107.2	258.11%
Chinook	344.0	256.0	103.6	-25.58%
Citra® (HBC 394)	91.0	327.0	132.3	259.34%
Crystal	29.0	101.0	40.9	248.28%
El Dorado®	63.0	205.0	83.0	225.40%
Mosaic™ (HBC 369)		272.0	110.1	
Simcoe® (YCR 14)	67.0	189.0	76.5	182.09%
Super Galena	161.0	92.0	37.2	-42.86%
Zeus	662.0	662.0	267.9	0.00%
Experimental	41.0	67.0	27.1	63.41%
Other Varieties	979.0	1,235.0	499.8	26.15%
TOTAL IDAHO #	3,743.0	4,975.0	2,013.3	32.91%
ILLINOIS	10.0	30.0	12.1	200.00%
INDIANA	8.0	25.0	10.1	212.50%
IOWA		5.0	2.0	
MAINE	10.0	11.5	4.7	15.00%
MARYLAND		15.0	6.1	
MICHIGAN	300.0	320.0	129.5	6.67%
MINNESOTA	20.0	26.0	10.5	30.00%
MONTANA	1.0	1.0	0.4	0.00%
NEBRASKA	12.0	17.0	6.9	41.67%
NEW YORK	150.0	250.0	101.2	66.67%
NORTH CAROLINA	30.0	40.0	16.2	33.33%
OHIO	30.0	50.0	20.2	66.67%
OREGON #				
Cascade	961.0	1,097.0	443.9	14.15%
Centennial	443.0	679.0	274.8	53.27%
Chinook		129.0	52.2	
Citra® (HBC 394)		235.0	95.1	
Crystal		397.0	160.7	
Fuggle		95.0	38.4	
Golding	234.0	238.0	96.3	1.71%
Liberty		177.0	71.6	
Magnum	176.0	270.0	109.3	53.41%
Mt. Hood	269.0	296.0	119.8	10.04%
Nugget	1,363.0	1,433.0	579.9	5.14%
Perle	100.0	96.0	38.8	-4.00%
Simcoe® (YCR 14)		189.0	76.5	
Sterling	130.0	220.0	89.0	69.23%
Super Galena	125.0	67.0	27.1	-46.40%
Tettnanger		141.0	57.1	
Willamette	564.0	718.0	290.6	27.30%
Experimental			0.0	
Other Varieties	1,045.0	330.0	133.5	-68.42%
TOTAL OREGON #	5,410.0	6,807.0	2,754.6	25.82%

PENNSYLVANIA		5.5	2.2	
VERMONT	25.0	45.0	18.2	80.00%
VIRGINIA	25.0	30.0	12.1	20.00%
WASHINGTON #			0.0	
ADHA-483 Azacca™	79.0	181.0	73.2	129.11%
ADHA-881 Jarrylo™	75.0	122.0	49.4	62.67%
Ahtanum™	194.0	145.0	58.7	-25.26%
Apollo®	700.0	708.0	286.5	1.14%
Bravo®	584.0	562.0	227.4	-3.77%
Cascade	4,837.0	4,934.0	1,996.7	2.01%
Centennial	2,836.0	3,770.0	1,525.6	32.93%
Chinook	1,297.0	1,300.0	526.1	0.23%
Citra® (HBC 394)	1,670.0	2,326.0	941.3	39.28%
Cluster	728.0	666.0	269.5	-8.52%
Columbus/Tomahawk®	1,738.0	1,677.0	678.6	-3.51%
Comet		108.0	43.7	
Crystal	181.0	131.0	53.0	-27.62%
El Dorado®	82.0	243.0	98.3	196.34%
Galena	306.0	294.0	119.0	-3.92%
Glacier	126.0	155.0	62.7	23.02%
Golding	94.0	53.0	21.4	-43.62%
Magnum		108.0	43.7	
Millennium	113.0	67.0	27.1	-40.71%
Mosaic™ (HBC 369)	671.0	1,518.0	614.3	126.23%
Mt. Hood	150.0	133.0	53.8	-11.33%
Northern Brewer	131.0	123.0	49.8	-6.11%
Nugget	265.0	202.0	81.7	-23.77%
Simcoe® (YCR 14)	1,819.0	2,889.0	1,169.1	58.82%
Summit™	2,522.0	1,688.0	683.1	-33.07%
Super Galena®	606.0	351.0	142.0	-42.08%
Tettnanger		38.0	15.4	
Vanguard	58.0	84.0	34.0	44.83%
Willamette	595.0	698.0	282.5	17.31%
YCR-4 - Palisade®	223.0	454.0	183.7	103.59%
YCR-5 - Warrior®	192.0		0.0	-100.00%
Zeus	3,375.0	2,989.0	1,209.6	-11.44%
Experimental	392.0	343.0	138.8	-12.50%
Other	2,219.0	3,145.0	1,272.7	41.73%
TOTAL WASHINGTON #	28,858.0	32,205.0	13,032.7	11.60%
WISCONSIN	120.0	170.0	68.8	41.67%
TOTAL PACIFIC NORTHWEST	38,011.0	43,987.0	17,800.6	15.72%
TOTAL NON-PNW US ACREAGE	881.0	1,249.0	505.4	41.77%
TOTAL UNITED STATES	38,892.0	45,239.0	18,307.2	16.32%
BRITISH COLUMBIA		79.0	32.0	
MANITOBA		5.0	2.0	
NEW BRUNSWICK		20.0	8.1	
NOVA SCOTIA		15.0	6.1	
ONTARIO		60.0	24.3	
PRINCE EDWARD ISLAND		7.5	3.0	
QUEBEC		70.0	28.3	
TOTAL CANADA		256.5	103.8	
TOTAL NORTH AMERICA		45,495.5	18,411.0	

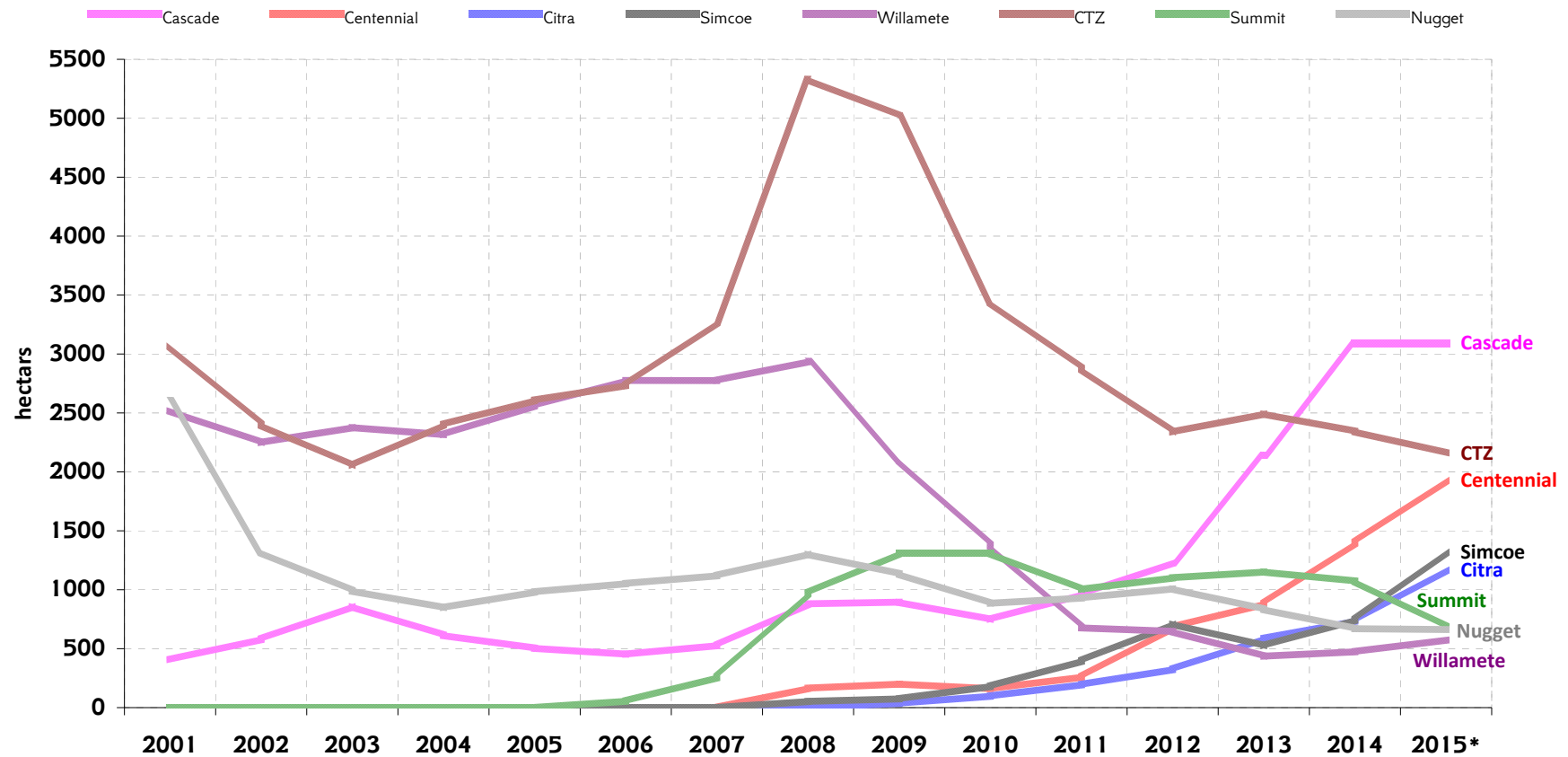
Figure 2,3: USA hop crops and variety development 2001 - 2015*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	14536	11776	11314	11232	11817	11912	12509	16551	16076	12645	12054	12923	14254	15382	18307
production	30315	26461	24750	25040	23494	24410	26757	36574	42946	29707	29385	27782	31454	32204	33858
alpha prod.	3450	3140	2900	2900	2584	2929	3280	4150	4690	4026	3700	3230	3680	3541	3647



* estimation

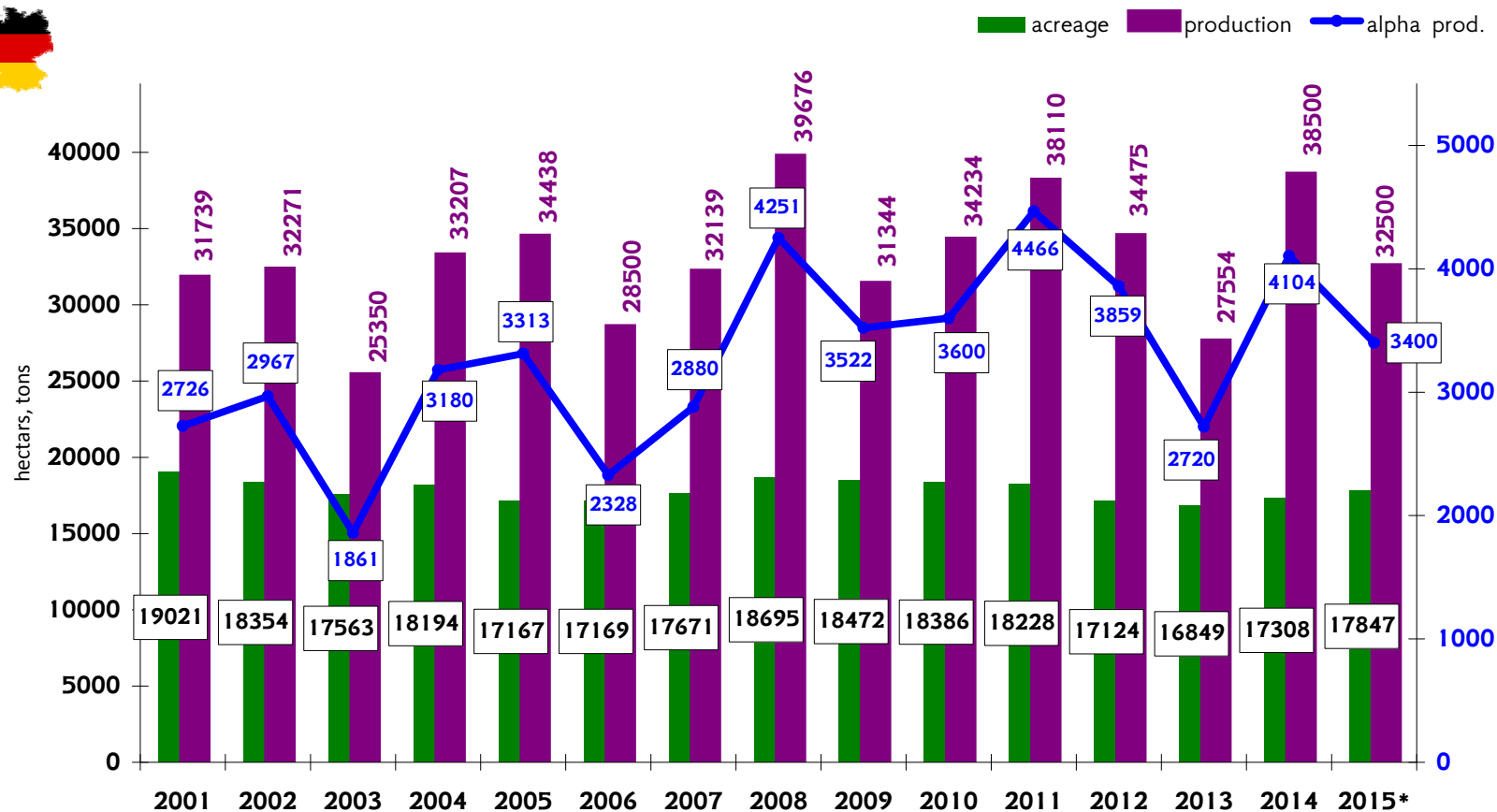
variety/year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
Cascade	406	580	859	613	504	452	527	880	895	748	960	1230	2140	3090	3090
Centennial	N/A	N/A	N/A	N/A	N/A	N/A	N/A	165	200	160	260	682	880	1400	1930
Citra	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	37	98	195	325	585	735	1169
Simcoe	N/A	N/A	N/A	N/A	N/A	N/A	N/A	52	74	181	396	710	525	744	1322
Willamete	2519	2248	2377	2315	2562	2776	2775	2937	2100	1376	677	646	435	475	575
CTZ	3070	2399	2052	2401	2607	2734	3269	5330	5019	3440	2876	2337	2493	2343	2160
Summit	N/A	N/A	N/A	N/A	N/A	55	256	972	1310	1310	1002	1101	1151	1073	685
Nugget	2605	1317	990	847	982	1052	1120	1303	1134	884	930	1009	834	670	662



source - IHGC and HGA

Figure 4,5: Germany hop crops and variety development 2001 - 2015*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	19021	18354	17563	18194	17167	17169	17671	18695	18472	18386	18228	17124	16849	17308	17847
production	31739	32271	25350	33207	34438	28500	32139	39676	31344	34234	38110	34475	27554	38500	32500
alpha prod.	2726	2967	1861	3180	3313	2328	2880	4251	3522	3600	4466	3859	2720	4104	3400



* estimation

variety/year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
Perle	3606	3374	2828	2839	2954	3108	3246	3297	3380	3403	3396	3203	3048	3154	3187
Hall. Tradition	1850	1778	1731	1958	2186	2319	2457	2503	2605	2624	2757	2748	2661	2825	2914
Hersbrucker	1644	1379	1271	1196	1050	871	747	740	768	758	776	785	847	924	954
Hall. Mtf	1409	1515	1903	1970	2018	2036	2082	2034	1150	1069	1065	1010	925	838	746
Magnum	4535	4844	4924	4870	4526	4387	4264	4277	4267	4202	4039	3509	3102	2642	2353
Hercules	N/A	N/A	N/A	N/A	N/A	224	868	1868	2388	2542	2614	2642	3086	3622	4152
Taurus	1155	1240	1284	1272	1216	1178	1146	1140	1106	1054	953	821	709	594	465
Northern Brev	1695	1244	870	665	612	550	471	438	401	375	345	296	281	267	238

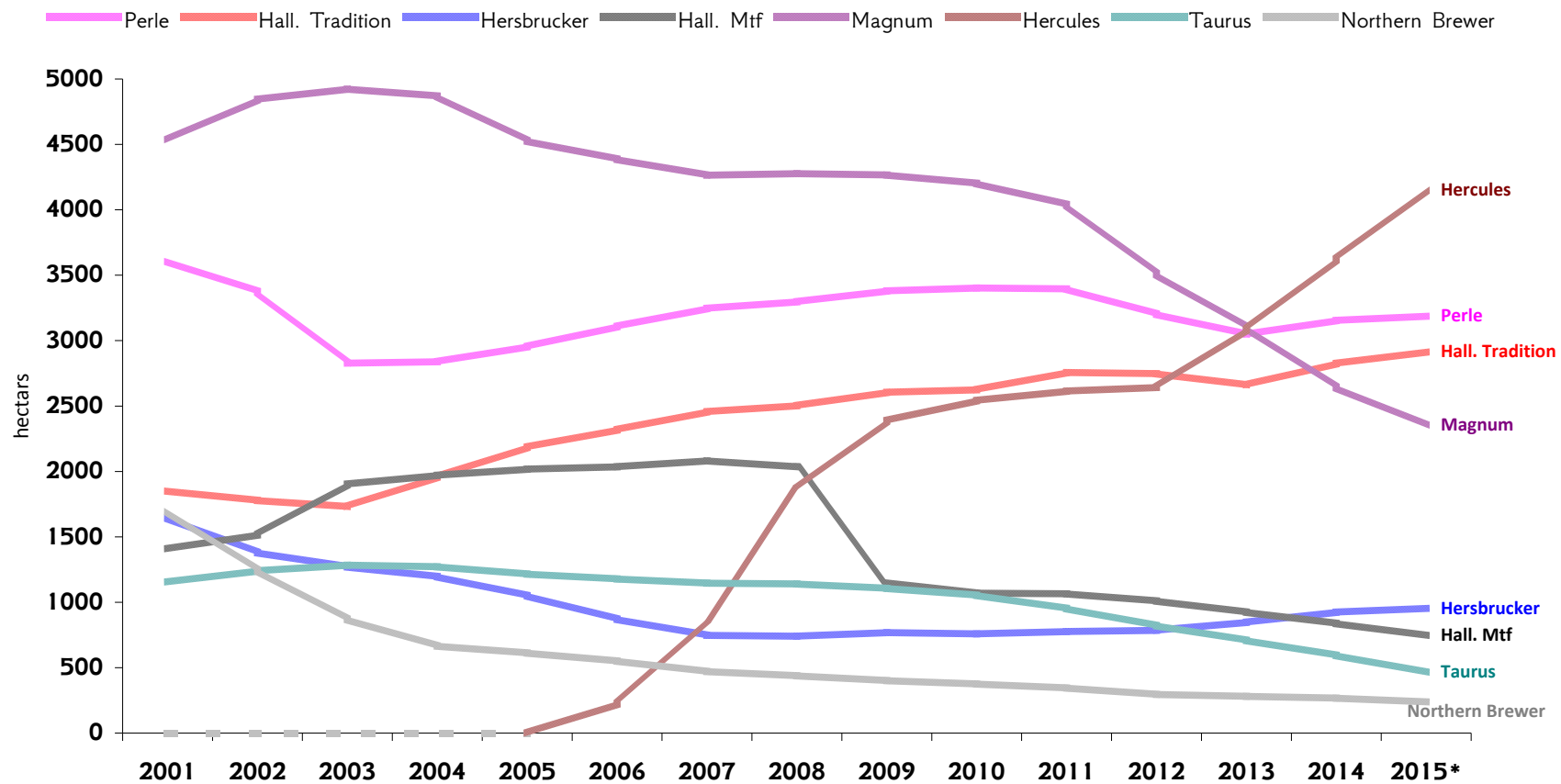
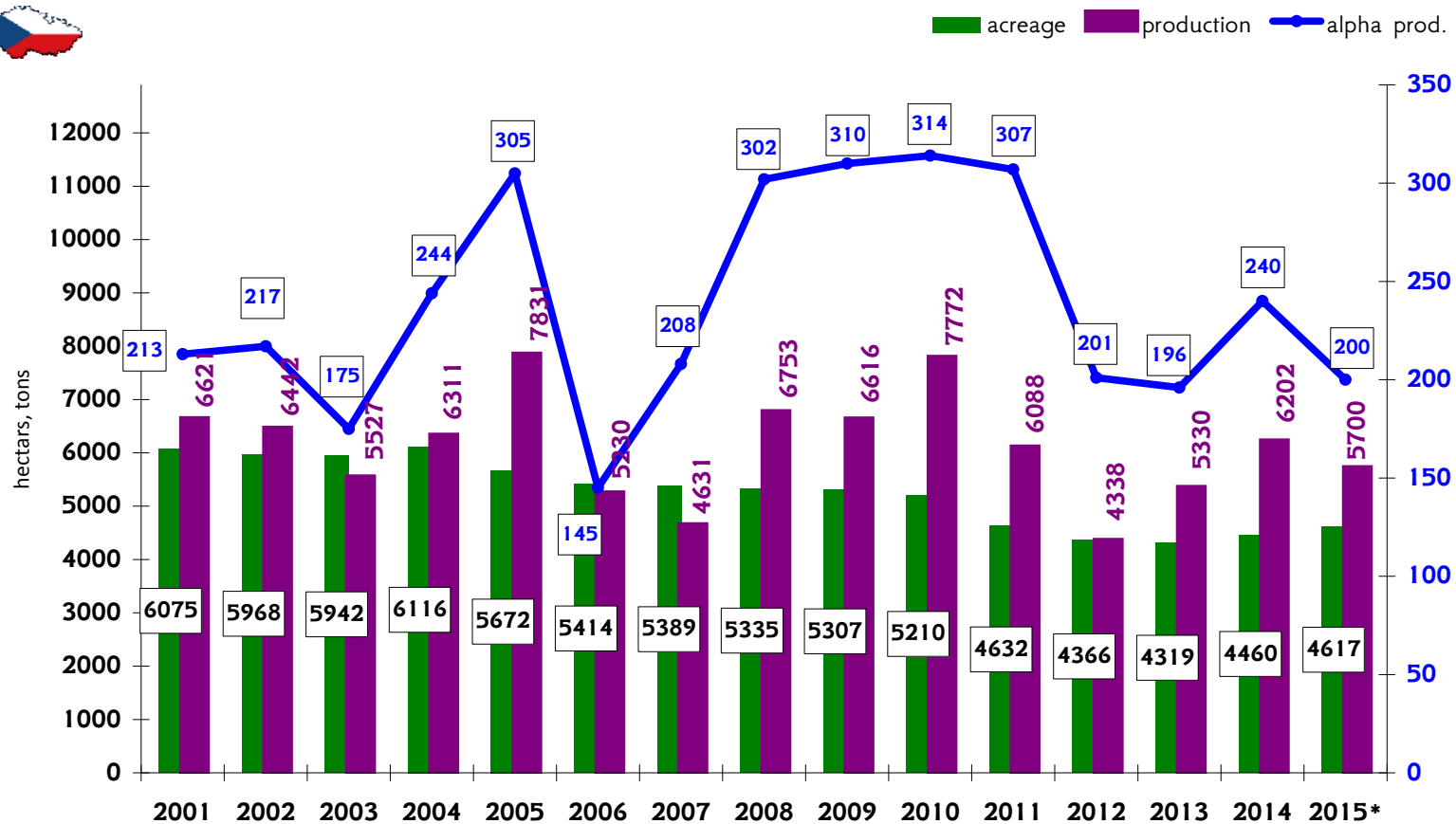


Figure 6,7: Czech Republic hop crops and variety development 2001 - 2015*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	6075	5968	5942	6116	5672	5414	5389	5335	5307	5210	4632	4366	4319	4460	4617
production	6621	6442	5527	6311	7831	5230	4631	6753	6616	7772	6088	4338	5330	6202	5700
alpha prod.	213	217	175	244	305	145	208	302	310	314	314	307	201	196	240



* estimation

variety/year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
SAAZ	5860	5639	5574	5407	5231	4926	4840	4738	4627	4557	4040	3806	3786	3894	4032
Sládek	92	152	163	195	202	222	215	239	277	277	249	242	240	270	269
Premiant	88	141	149	150	153	181	249	267	293	277	256	229	201	187	179
Agnus	2	3	19	52	52	51	51	51	58	61	52	53	44	40	38
Kazbek	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1	1	3	18	20
Saaz Late	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	9	9	15	34

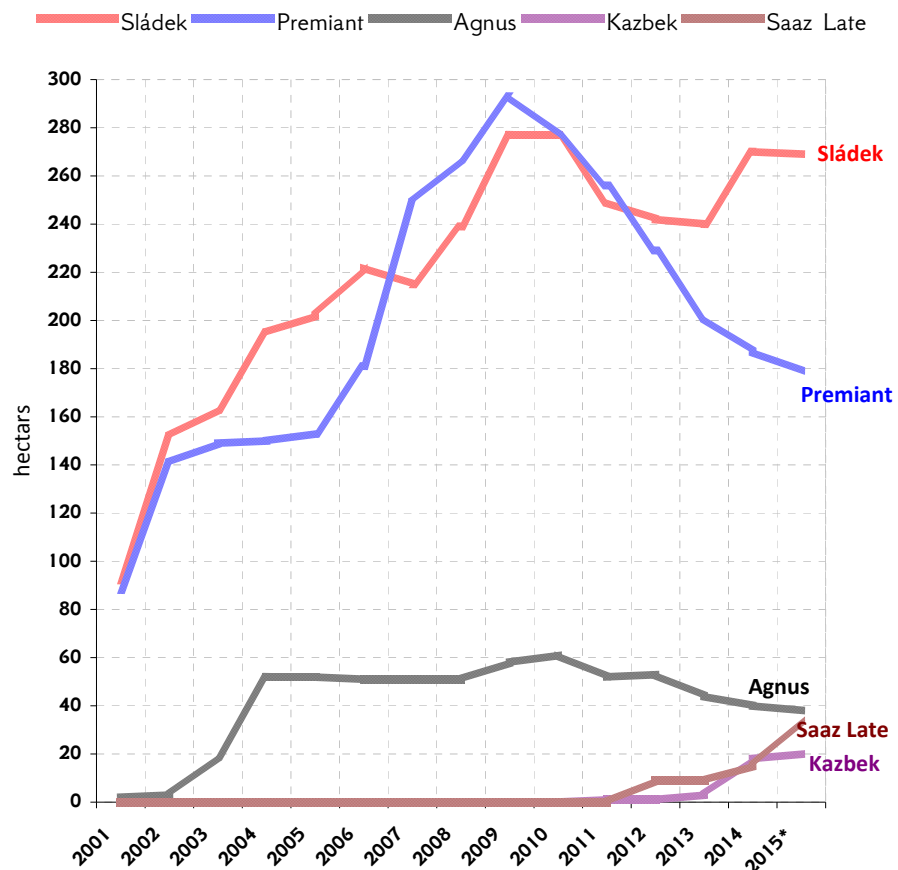
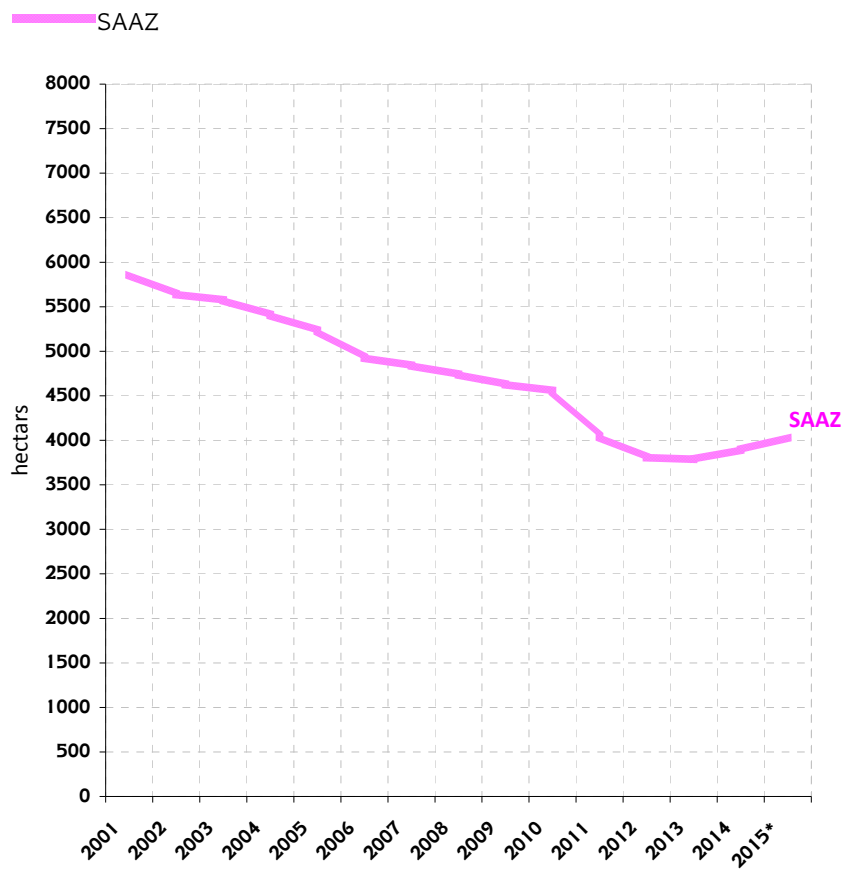
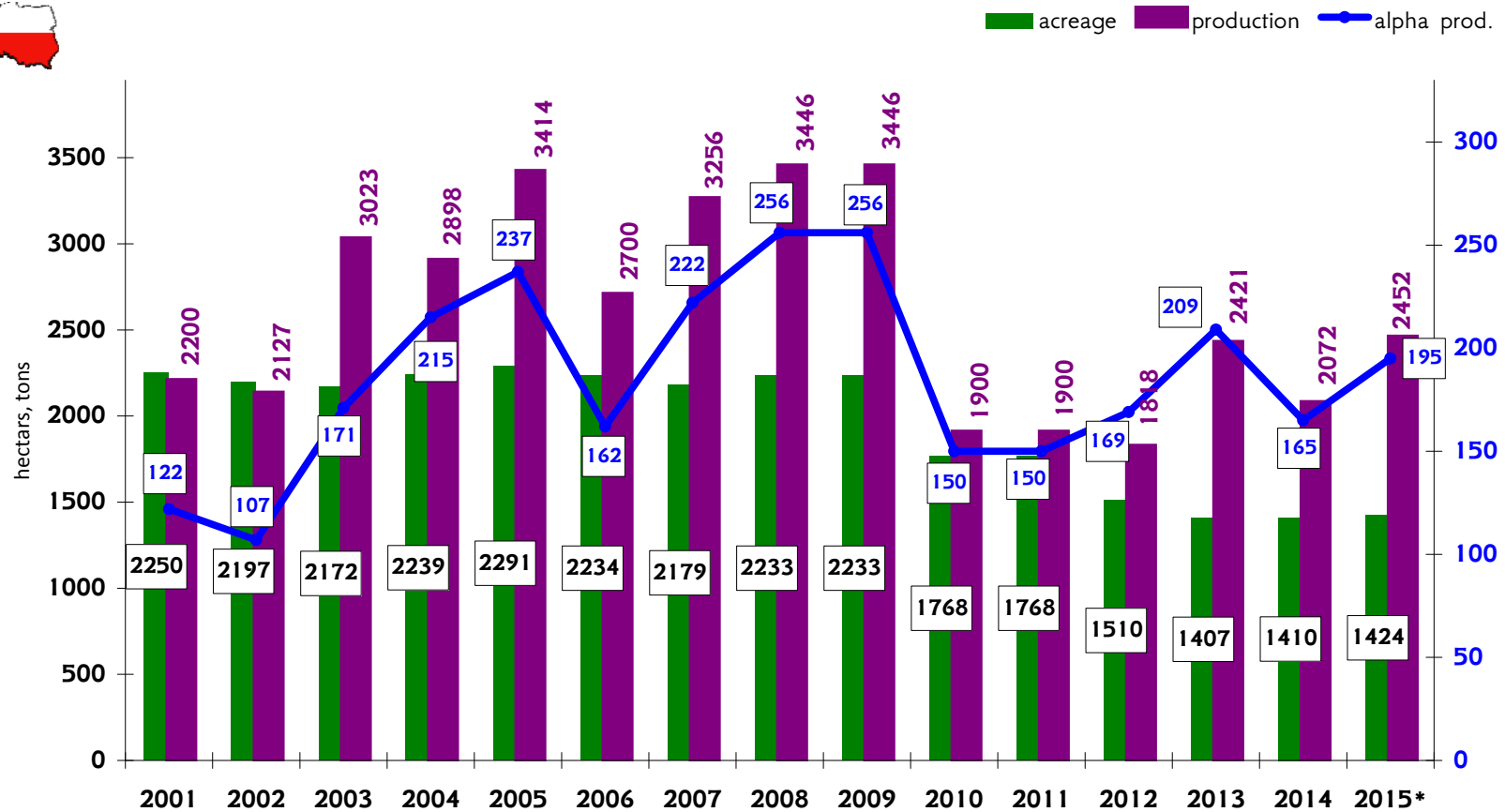


Figure 8,9: Poland hop crops and variety development 2001 - 2015*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	2250	2197	2172	2239	2291	2234	2179	2233	2233	1768	1768	1510	1407	1410	1424
production	2200	2127	3023	2898	3414	2700	3256	3446	3446	1900	1900	1818	2421	2072	2452
alpha prod.	122	107	171	215	237	162	222	256	256	150	150	169	209	165	195



* estimation

variety/year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
Lubelski	1290	1022	836	792	795	N/A	639	591	N/A	N/A	N/A	297	330	369	384
Lomik	40	45	45	49	47	N/A	30	31	N/A	N/A	N/A	7	5	4	4
Marynka	650	849	964	1033	1061	N/A	958	950	N/A	N/A	N/A	463	347	302	295
Magnum	N/A	154	257	305	316	N/A	372	433	N/A	N/A	N/A	510	518	506	496
Perle	N/A	N/A	N/A	N/A	N/A	N/A	86	102	N/A	N/A	N/A	88	67	62	61

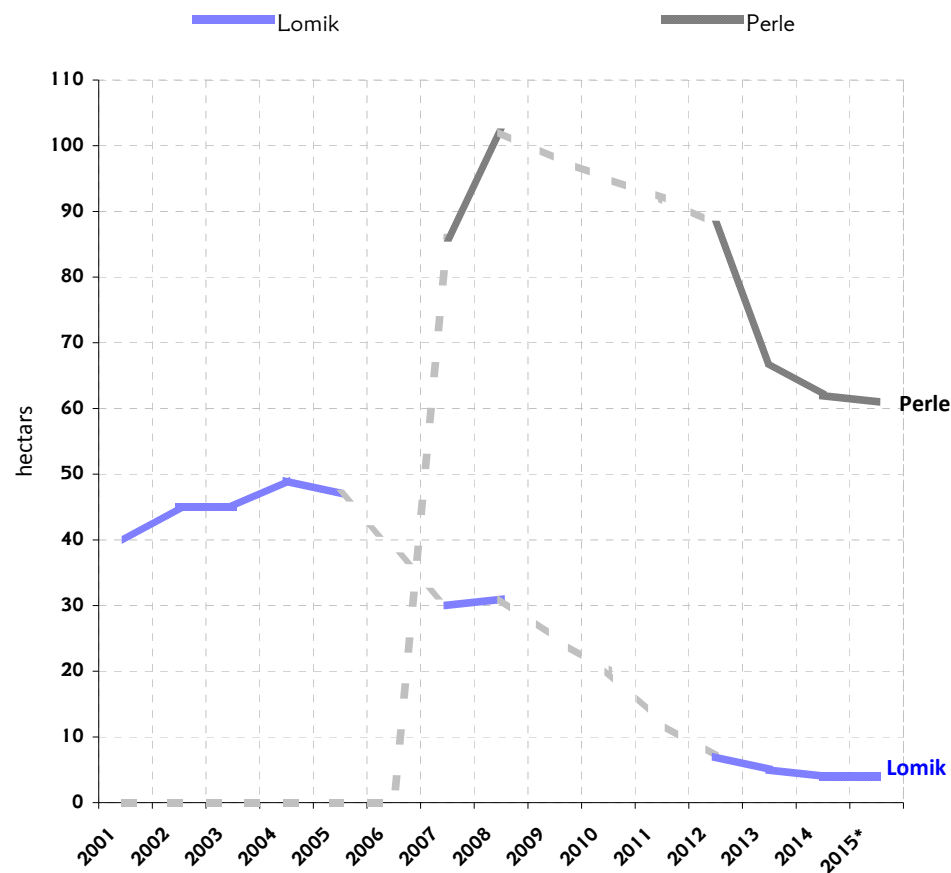
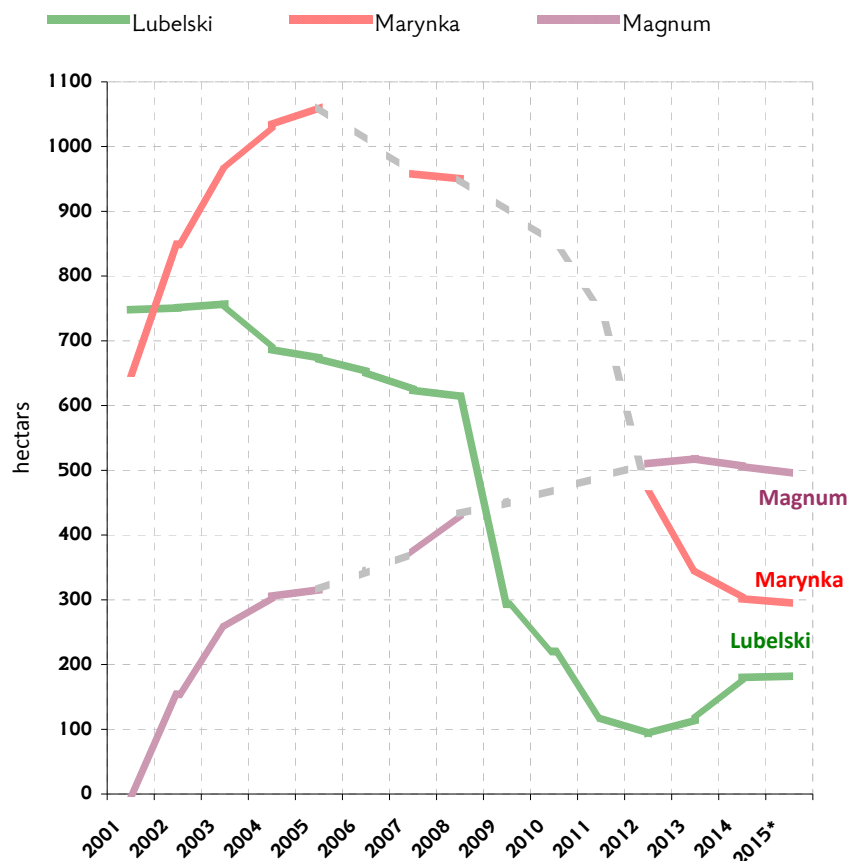
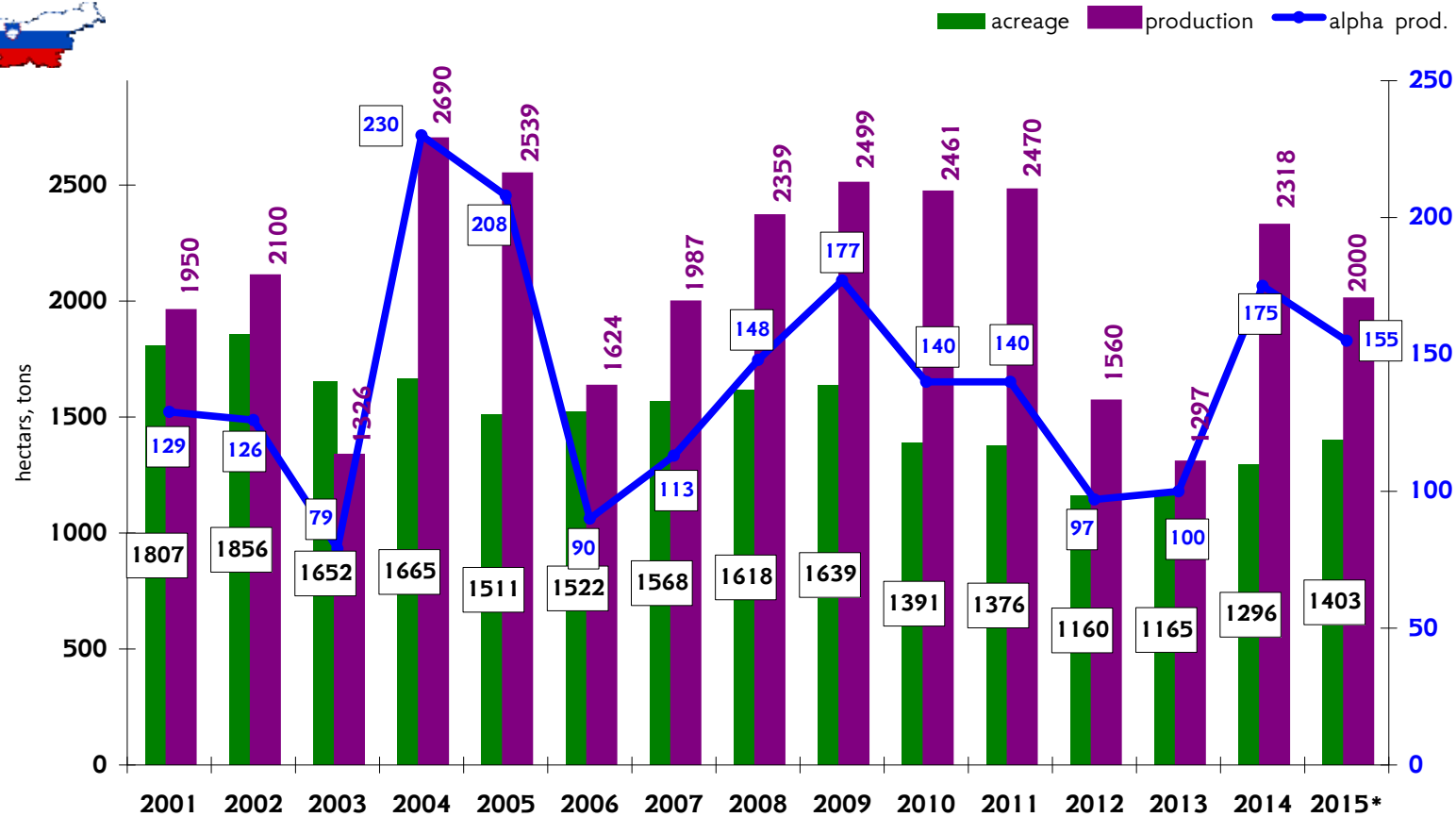


Figure 10,11: Slovenia hop crops and variety development 2001 - 2015*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	1807	1856	1652	1665	1511	1522	1568	1618	1639	1391	1376	1160	1165	1296	1403
production	1950	2100	1326	2690	2539	1624	1987	2359	2499	2461	2470	1560	1297	2318	2000
alpha prod.	129	126	79	230	208	90	113	148	177	140	140	97	100	175	155



* estimation

variety/year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
Styrian Golding/Celeia	345	368	N/A	393	390	404	313	323	323	168	179	230	312	403	494
Super Styrian AURORA	1195	1138	N/A	966	953	961	992	936	960	845	813	654	582	578	526
Sav. Golding	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	167	169	133	128	146	152
Magnum	96	98	N/A	93	72	62	78	62	64	59	59	25	17	15	15

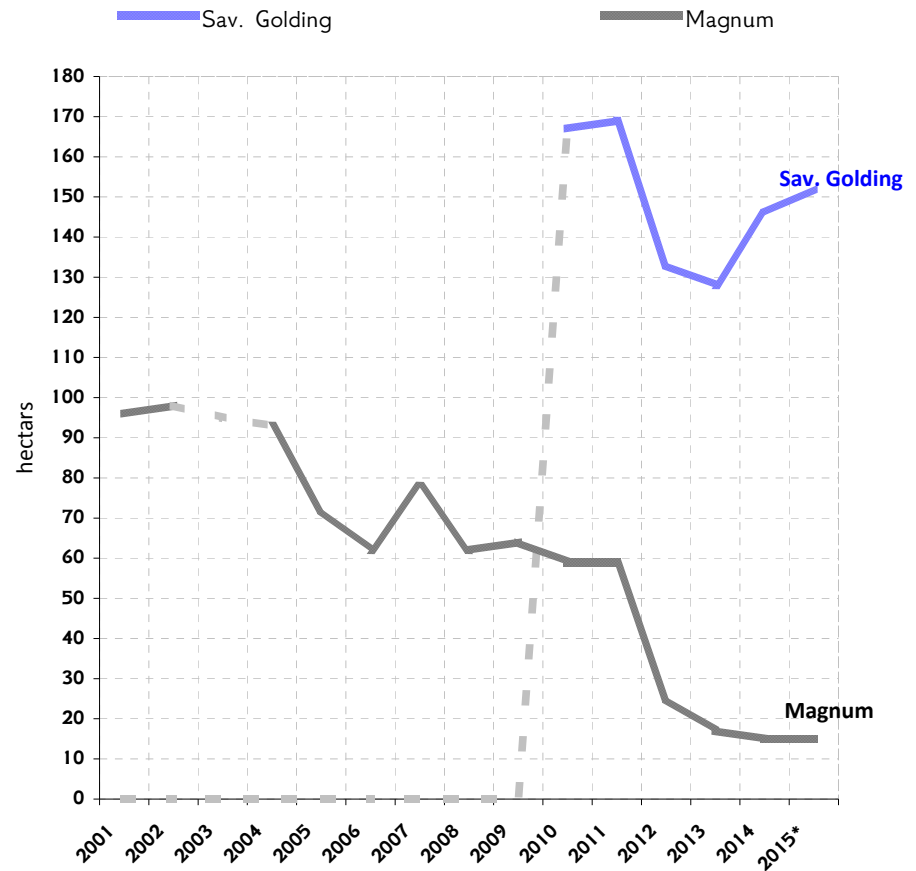
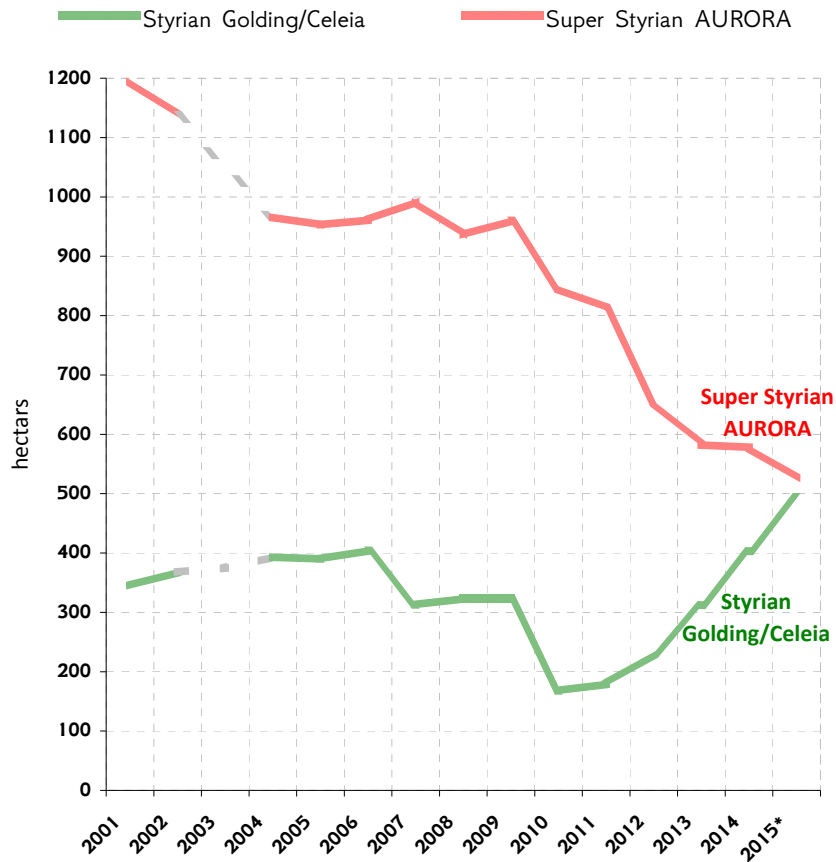
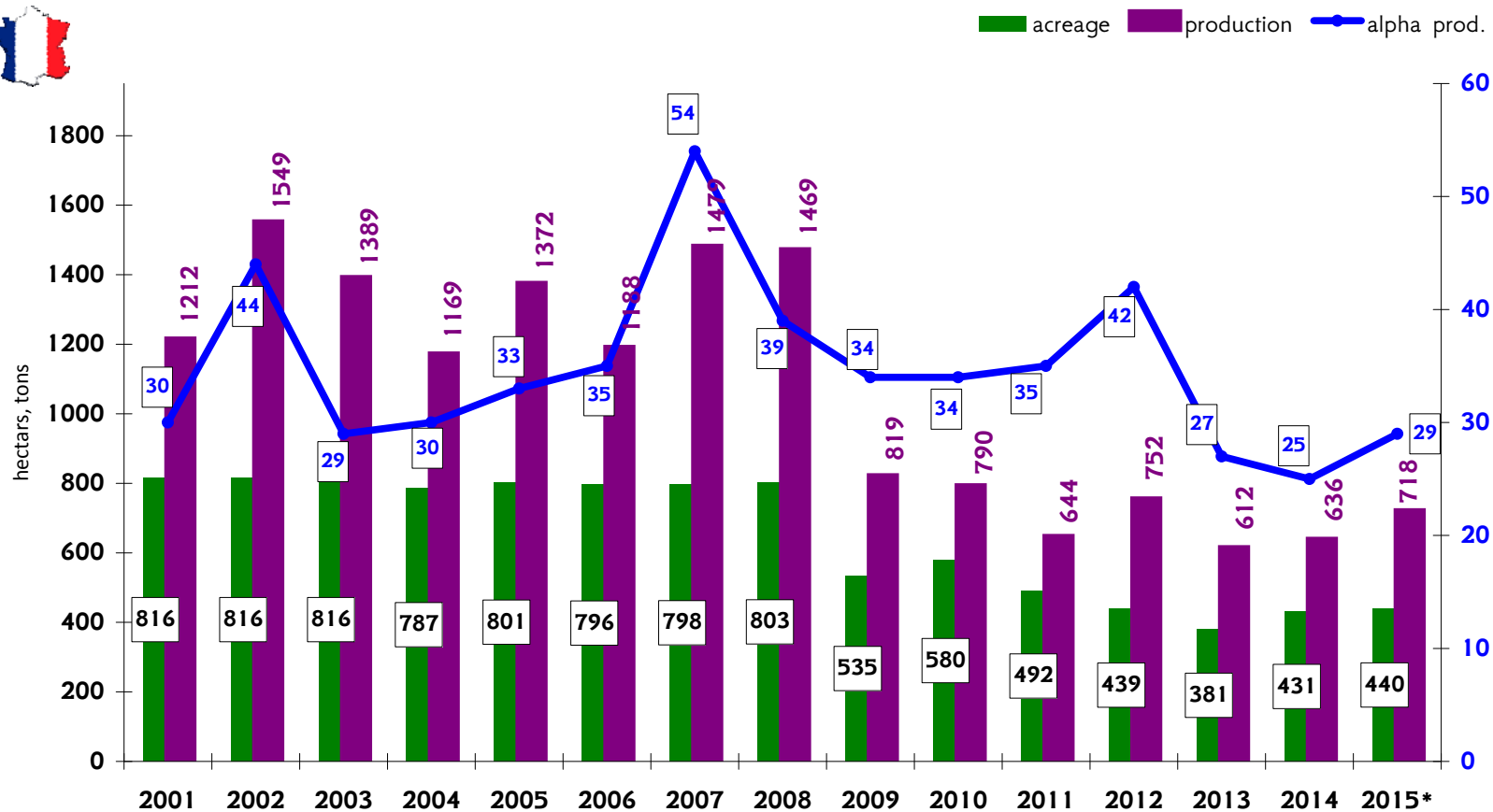


Figure 12,13: France hop crops and variety development 2001 - 2015*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	816	816	816	787	801	796	798	803	535	580	492	439	381	431	440
production	1212	1549	1389	1169	1372	1188	1479	1469	819	790	644	752	612	636	718
alpha prod.	30	44	29	30	33	35	54	39	34	34	35	42	27	25	29



* estimation

variety/year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
Strisselspalt	748	751	757	687	673	652	624	614	293	220	118	93	115	180	182
Tradition	N/A	14	14	50	77	98	126	126	152	204	158	107	42	35	32
Challenger	N/A	6	6	6	N/A	N/A	8	8	8	N/A	N/A	N/A	6	6	6
Aramis	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	20	52	49	47	46
Nugget	17	14	9	7	5	5	3	3	4	14	21	21	21	21	16
Magnum	N/A	12	13	14	4	4	11	12	8	10	7	5	5	5	5
Columbus	N/A	4	4	9	10	10	13	16	18	26	29	24	24	11	9

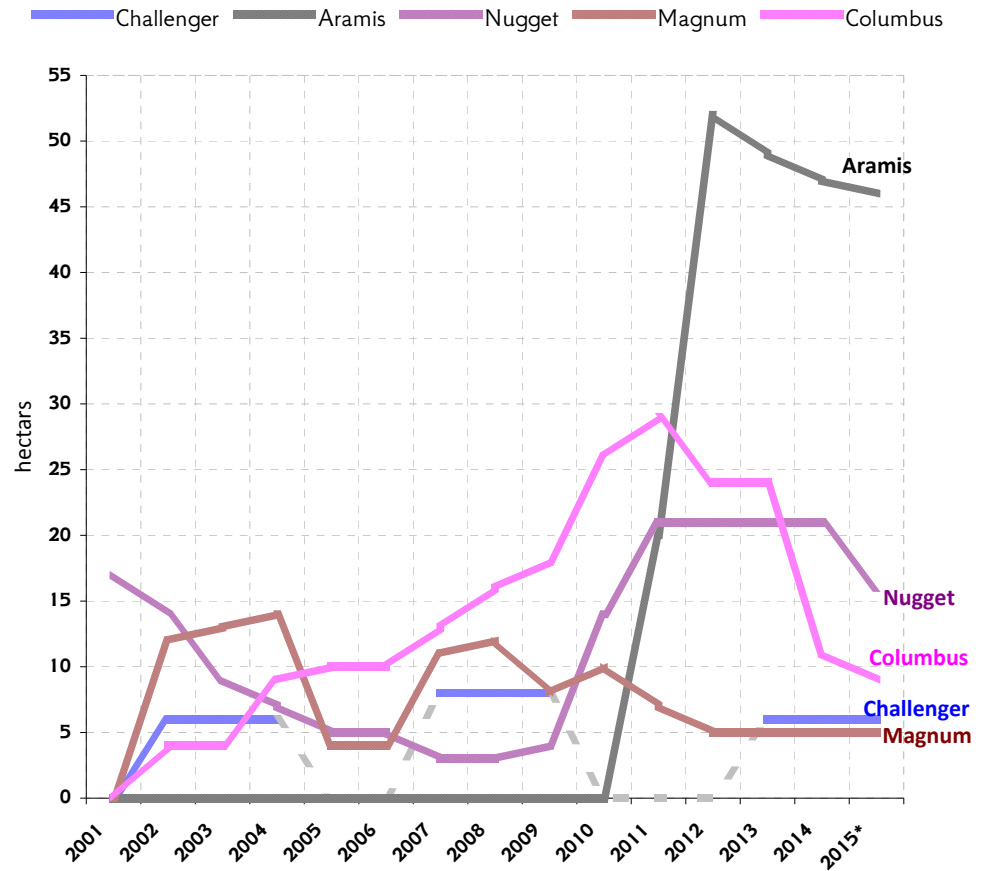
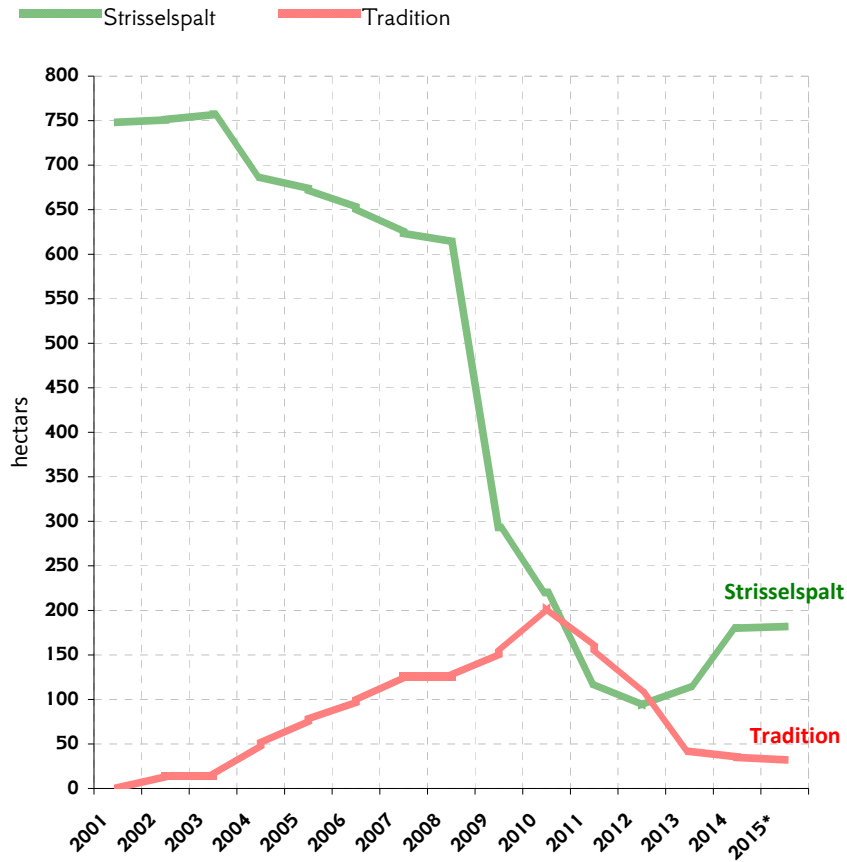


Figure 14: Australia hop crops 2001 - 2015

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
acreage	782	862	439	535	449	364	441	484	514	448	455	452	449	408	488
production	2181	2385	1272	1272	1238	1035	890	1189	1343	1099	1044	1093	1138	1079	1201
alpha prod.	281	317	157	157	185	128	117	154	166	144	130	143	143	140	150

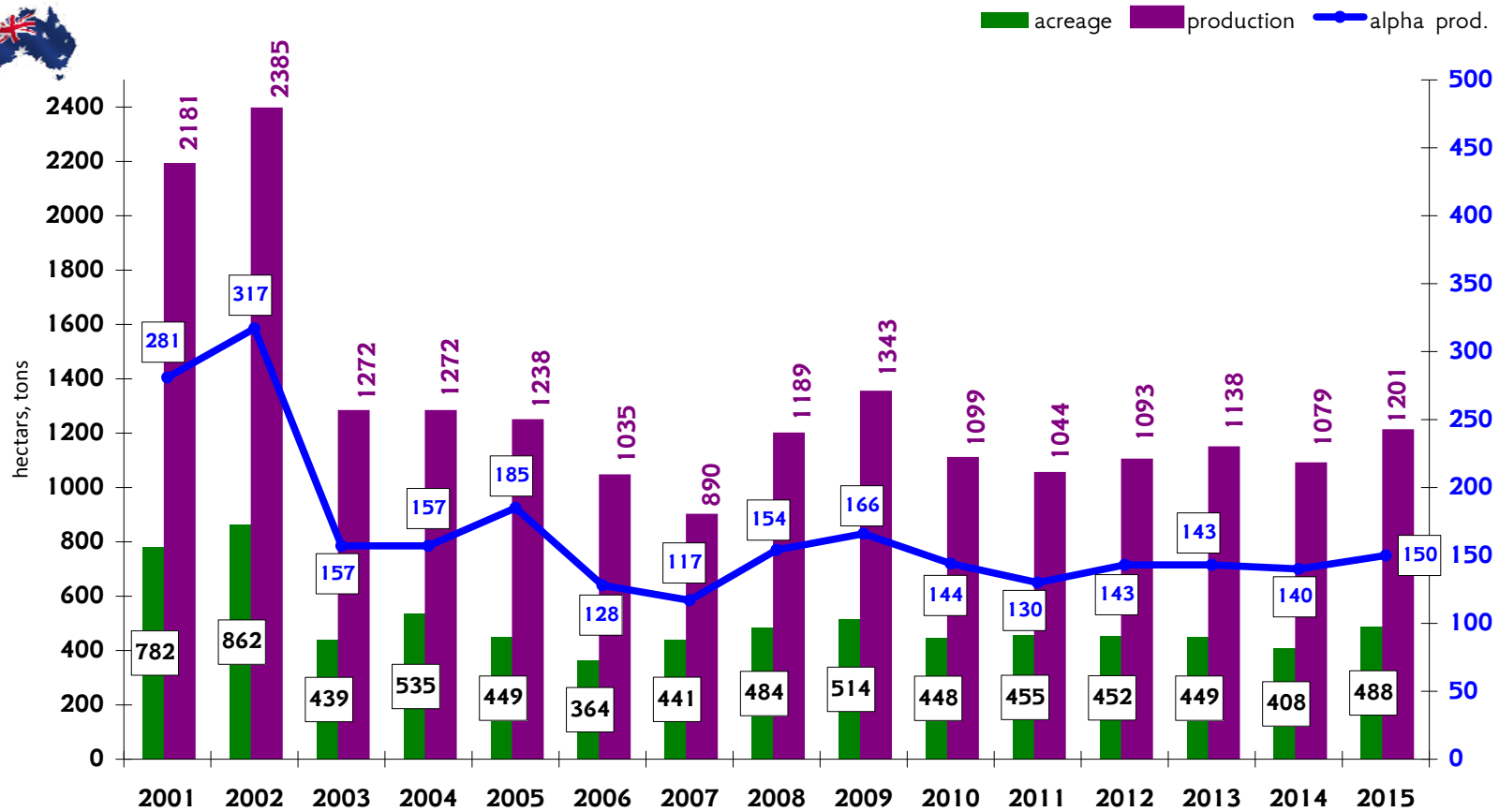
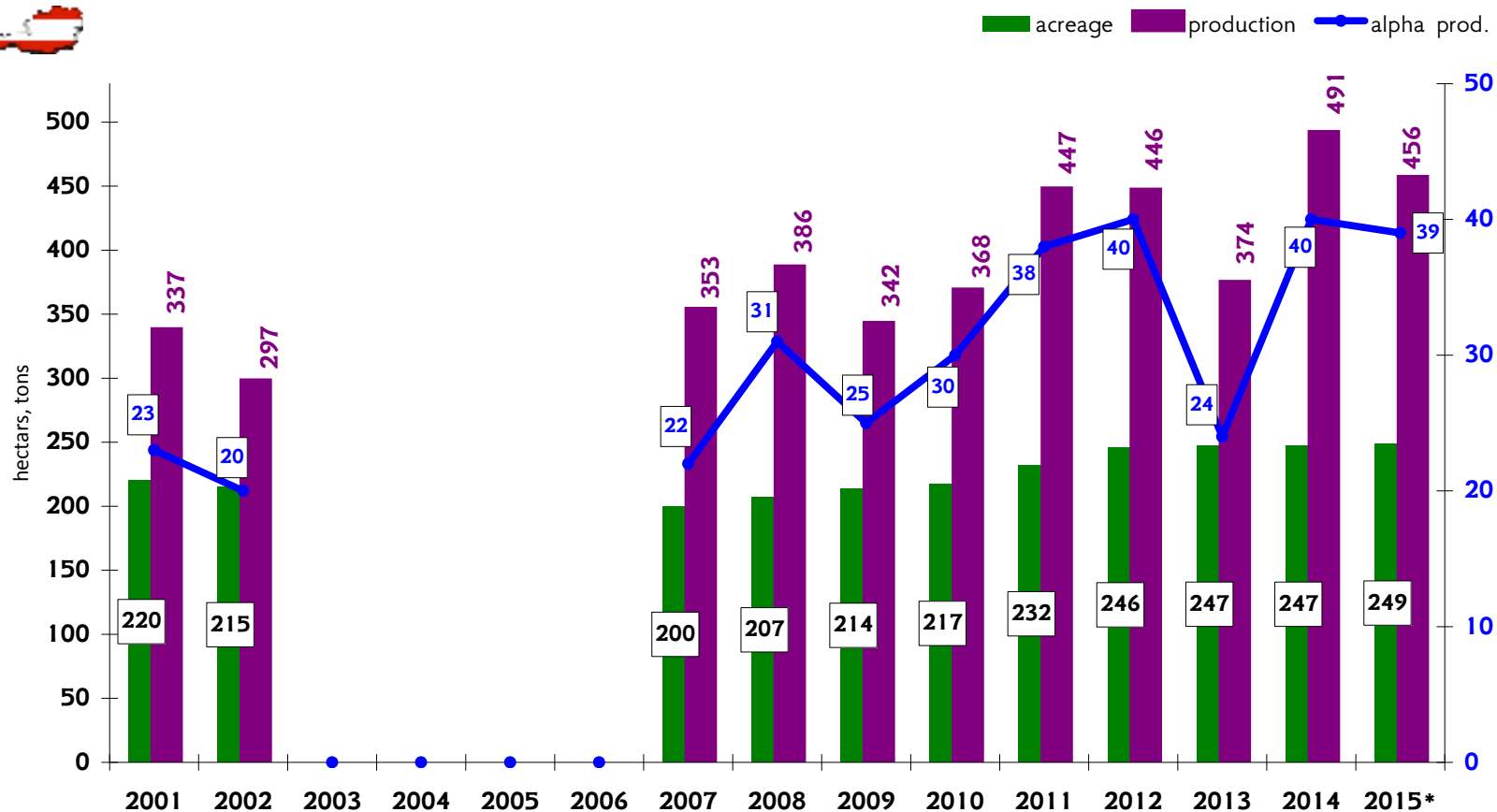


Figure 15: Austria hop crops 2001 - 2015*

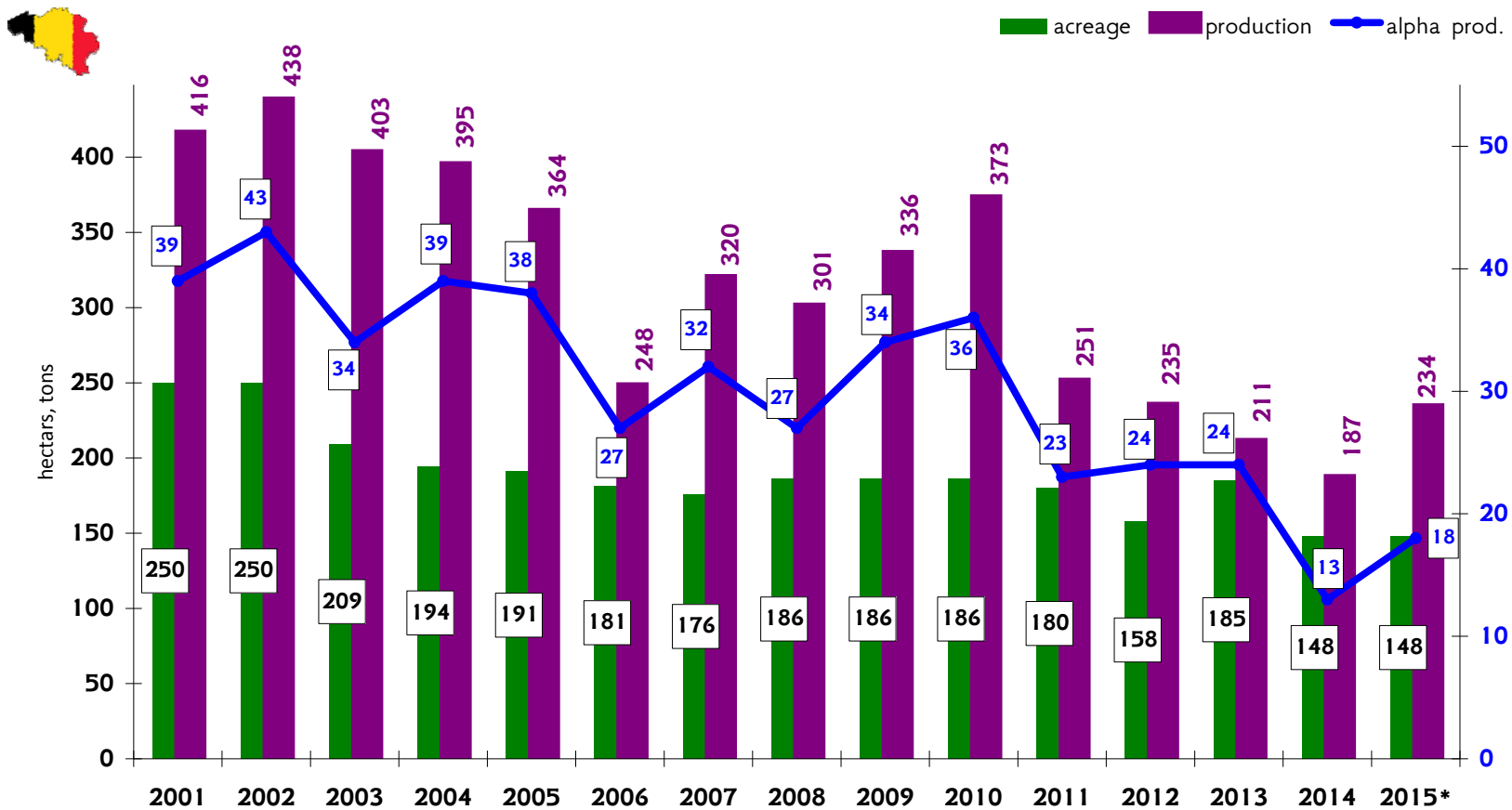
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	220	215	N/A	N/A	N/A	N/A	200	207	214	217	232	246	247	247	249
production	337	297	N/A	N/A	N/A	N/A	353	386	342	368	447	446	374	491	456
alpha prod.	23	20	N/A	N/A	N/A	N/A	22	31	25	30	38	24	40	40	39



* estimation

Figure 16: Belgium hop crops 2001 - 2015*

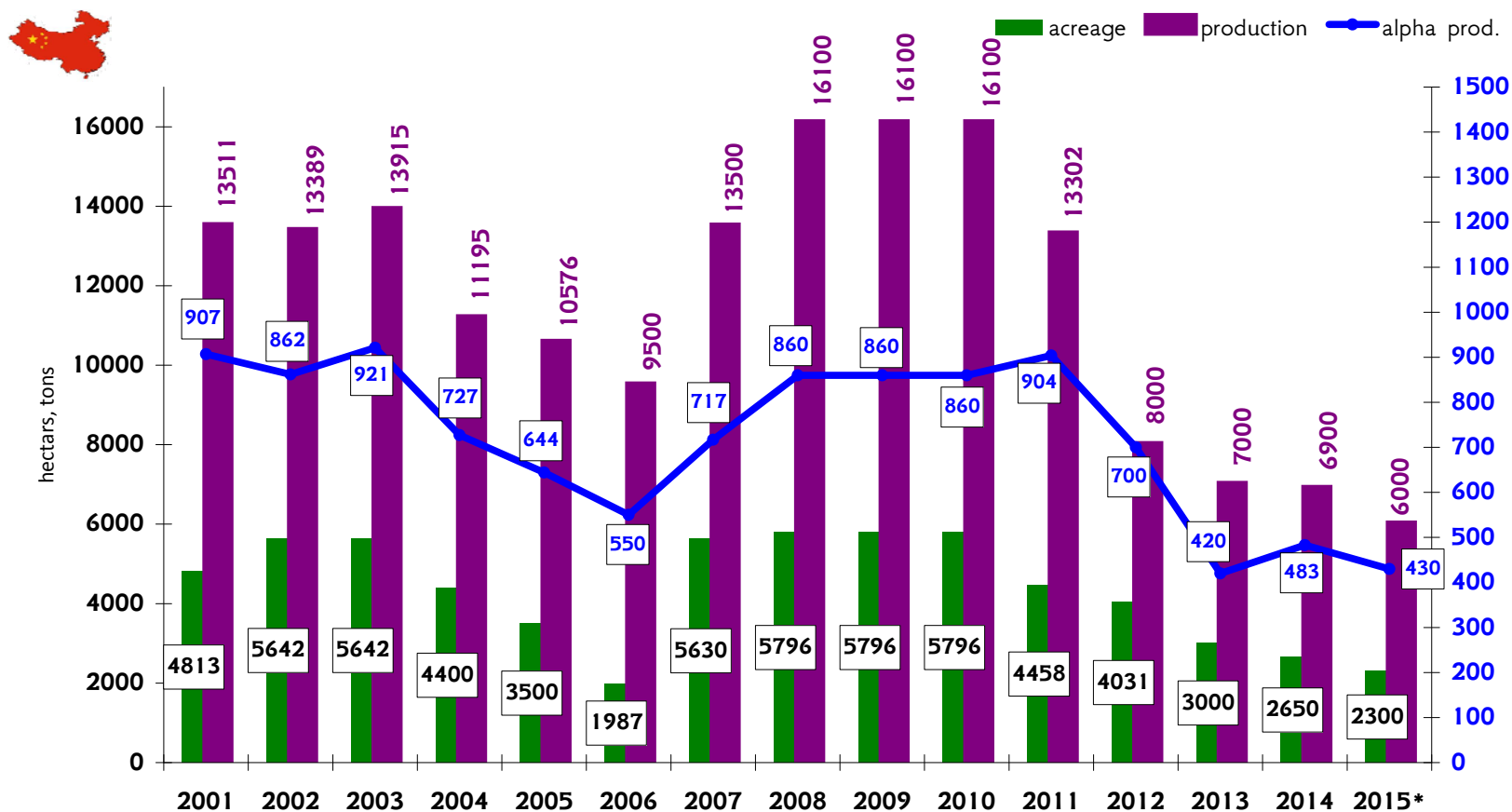
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	250	250	209	194	191	181	176	186	186	186	180	158	185	148	148
production	416	438	403	395	364	248	320	301	336	373	251	235	211	187	234
alpha prod.	39	43	34	39	38	27	32	27	34	36	23	24	24	13	18



* estimation

Figure 17: China hop crops 2001 - 2015*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	4813	5642	5642	4400	3500	1987	5630	5796	5796	5796	4458	4031	3000	2650	2300
production	13511	13389	13915	11195	10576	9500	13500	16100	16100	16100	13302	8000	7000	6900	6000
alpha prod.	907	862	921	727	644	550	717	860	860	860	860	904	700	420	483



* estimation

Figure 18: New Zealand hop crops 2001 - 2015*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
acreage	394	406	426	422	403	353	350	365	400	380	380	365	378	370	388
production	725	884	781	792	845	666	700	730	832	790	575	694	703	765	740
alpha prod.	88	95	87	65	83	64	79	85	95	95	60	69	70	74	70

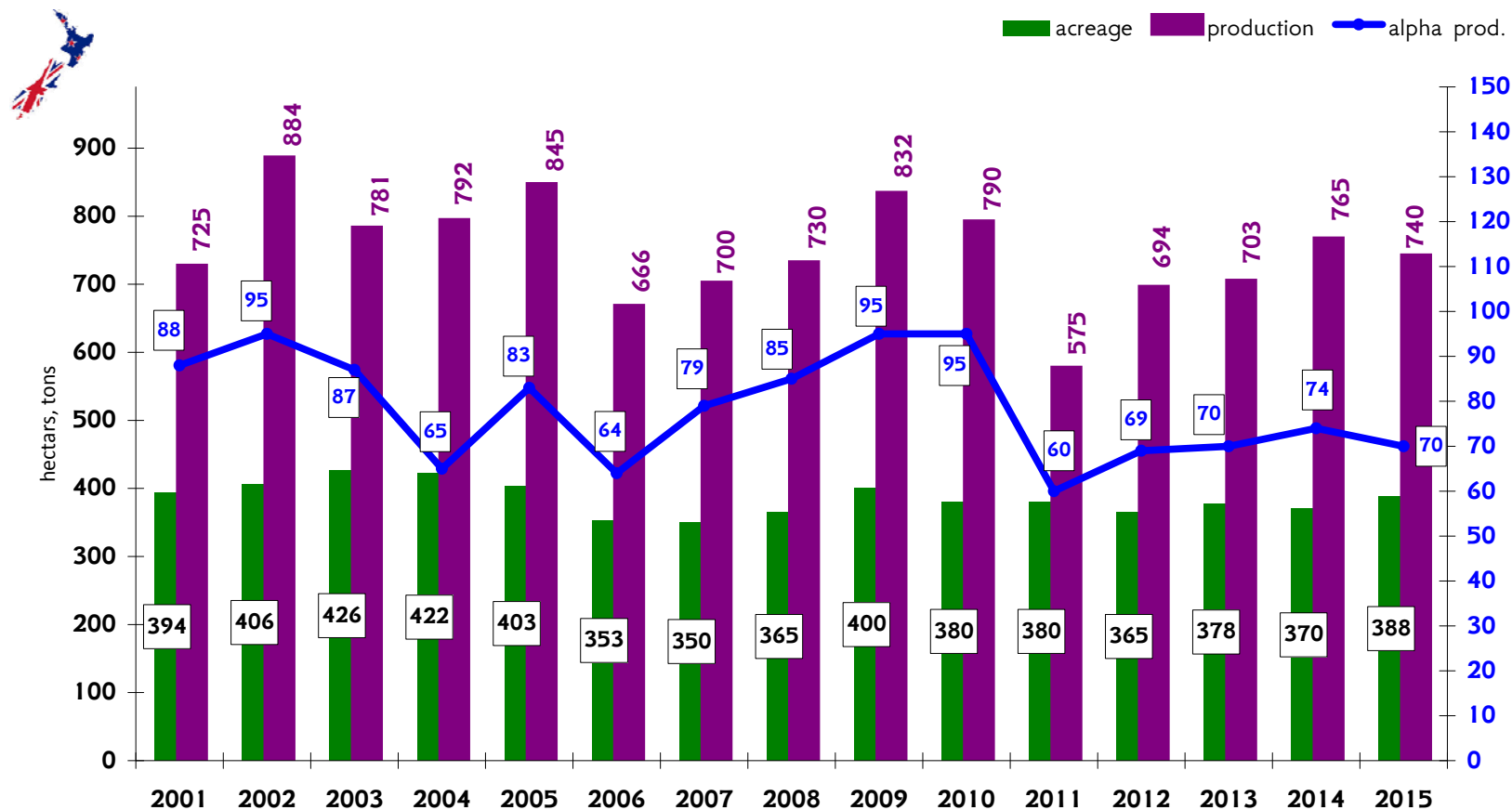
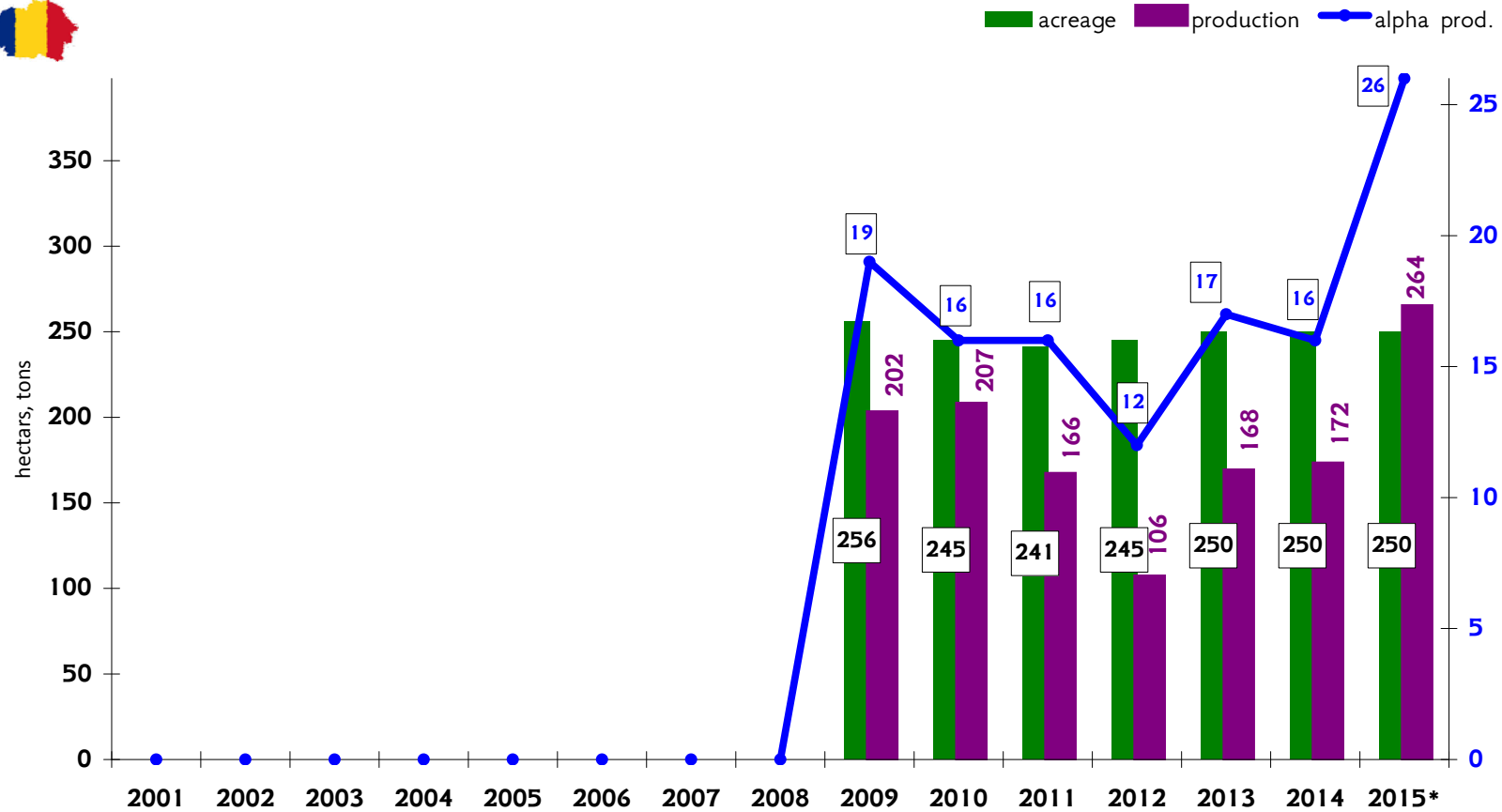


Figure 19: Romania hop crops 2001 - 2015*

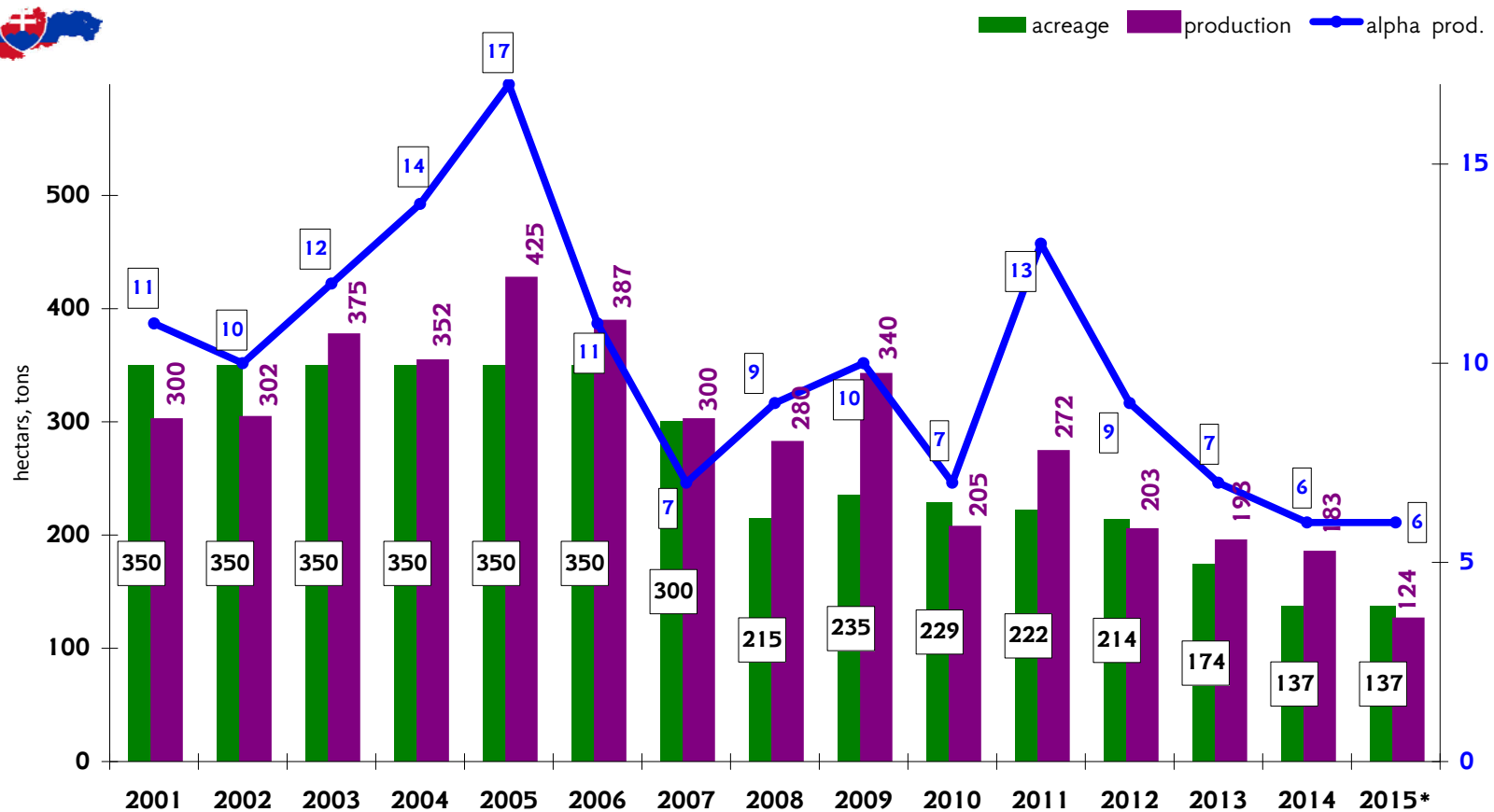
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	256	245	241	245	250	250	250
production	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	202	207	166	106	168	172	264
alpha prod.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	19	16	16	12	17	16	26



* estimation

Figure 20: Slovakia hop crops 2001 - 2015*

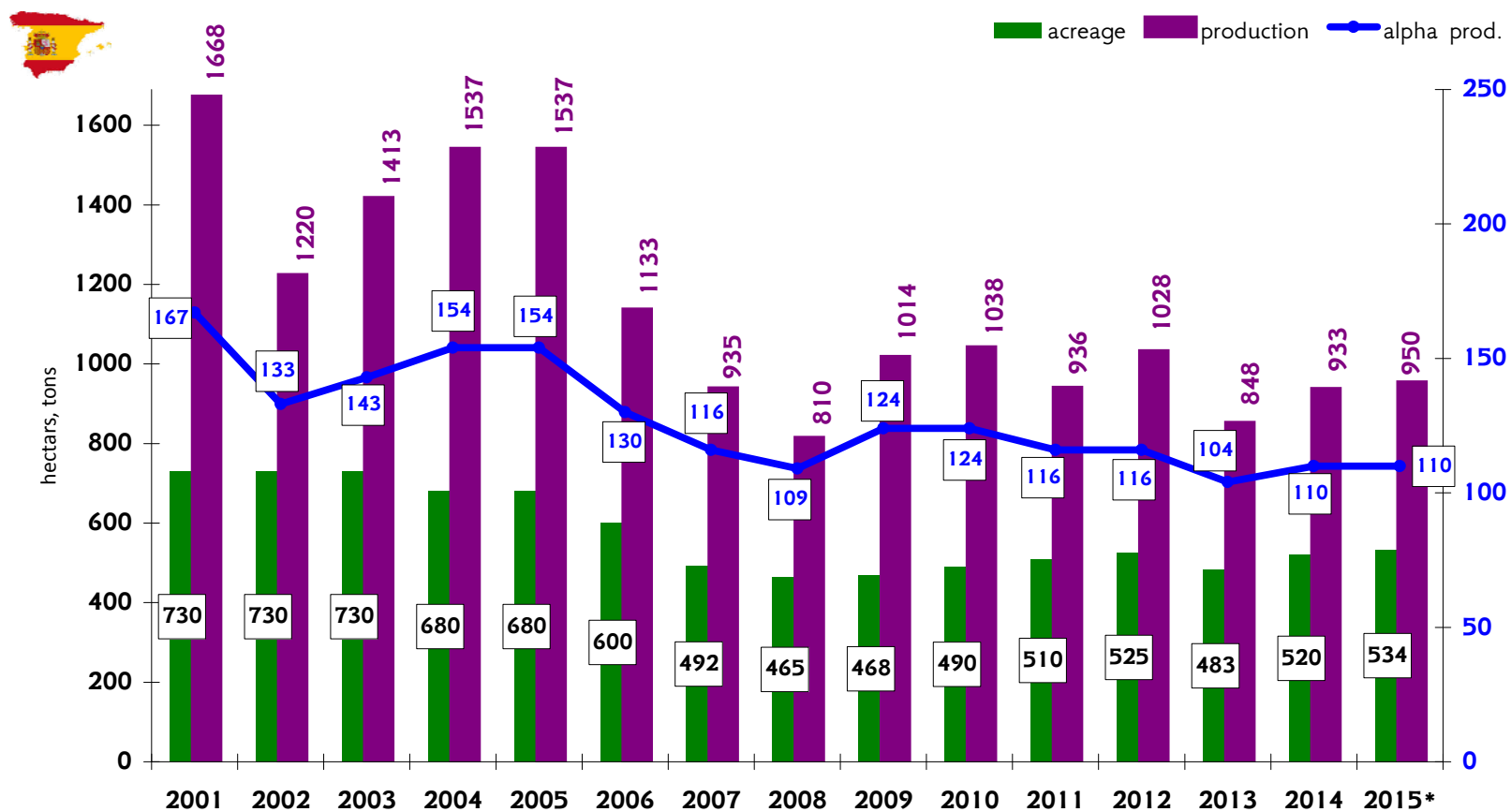
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	350	350	350	350	350	350	300	215	235	229	222	214	174	137	137
production	300	302	375	352	425	387	300	280	340	205	272	203	193	183	124
alpha prod.	11	10	12	14	17	11	7	9	10	7	13	9	7	6	6



* estimation

Figure 21: Spain hop crops 2001 - 2015*

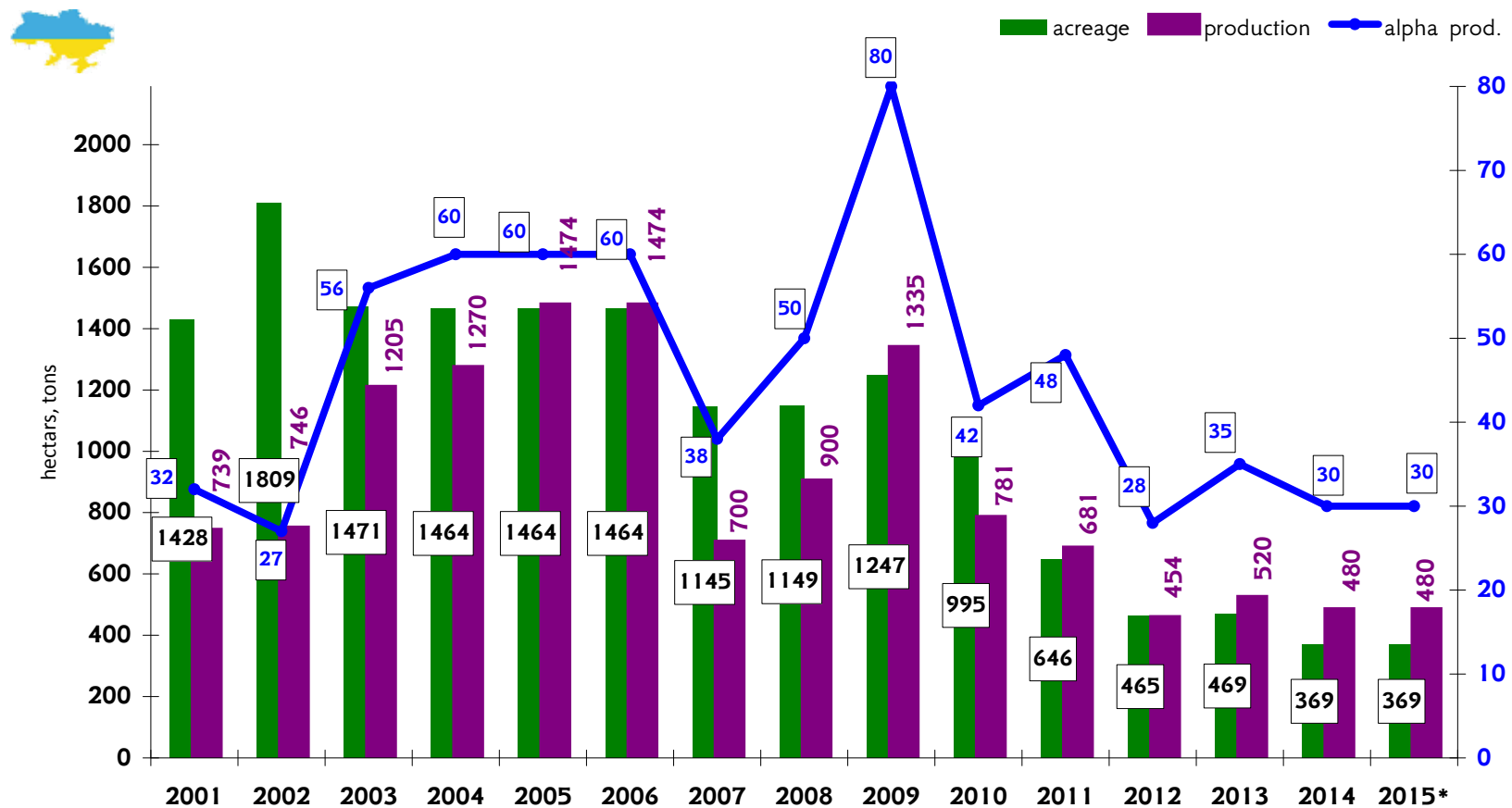
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	730	730	730	680	680	600	492	465	468	490	510	525	483	520	534
production	1668	1220	1413	1537	1537	1133	935	810	1014	1038	936	1028	848	933	950
alpha prod.	167	133	143	154	154	130	116	109	124	124	116	116	104	110	110



* estimation

Figure 22: Ukraine hop crops 2001 - 2015*

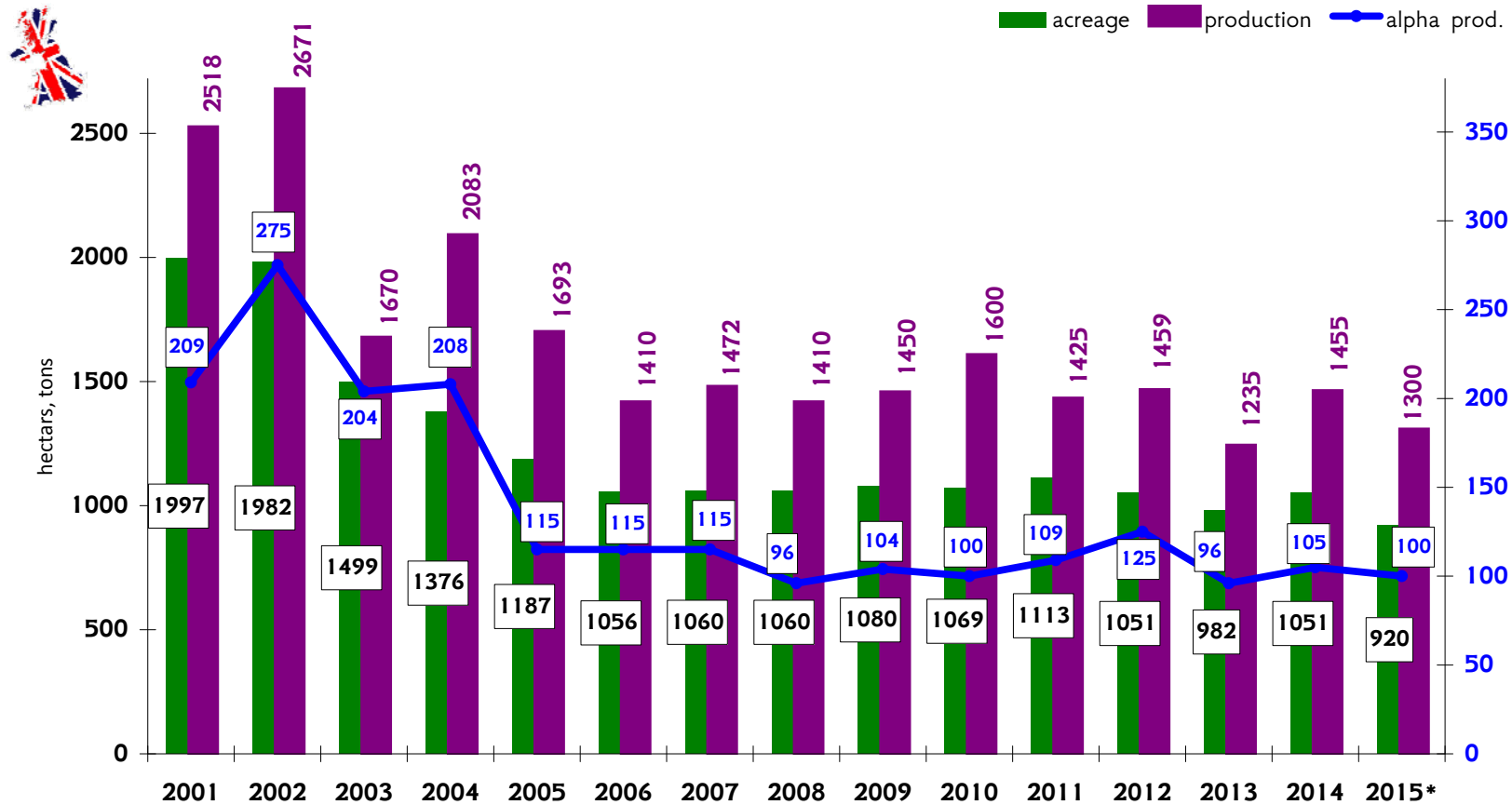
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	1428	1809	1471	1464	1464	1464	1145	1149	1247	995	646	465	469	369	369
production	739	746	1205	1270	1474	1474	700	900	1335	781	681	454	520	480	480
alpha prod.	32	27	56	60	60	60	38	50	80	42	48	28	35	30	30



* estimation

Figure 23: UK-England hop crops 2001 - 2015*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	1997	1982	1499	1376	1187	1056	1060	1060	1080	1069	1113	1051	982	1051	920
production	2518	2671	1670	2083	1693	1410	1472	1410	1450	1600	1425	1459	1235	1455	1300
alpha prod.	209	275	204	208	115	115	115	96	104	100	109	125	96	105	100



* estimation