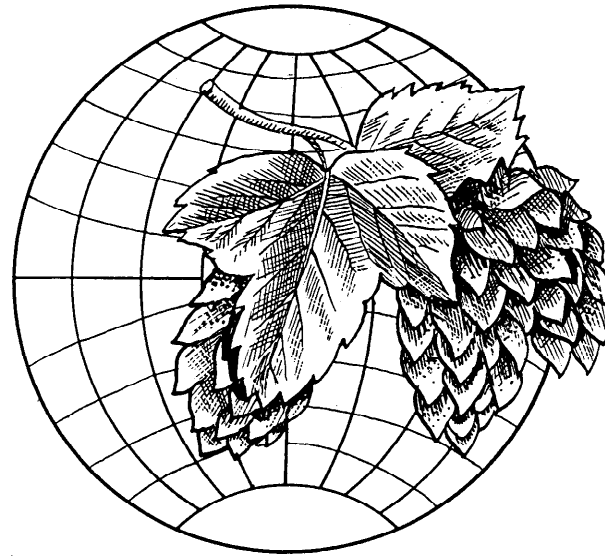


# INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

VIDEO-CALL  
AUGUST, 2020



# International Hop Growers' Convention

## IHGC - Economic Commission Summary Reports

Video-Call - August 12, 2020

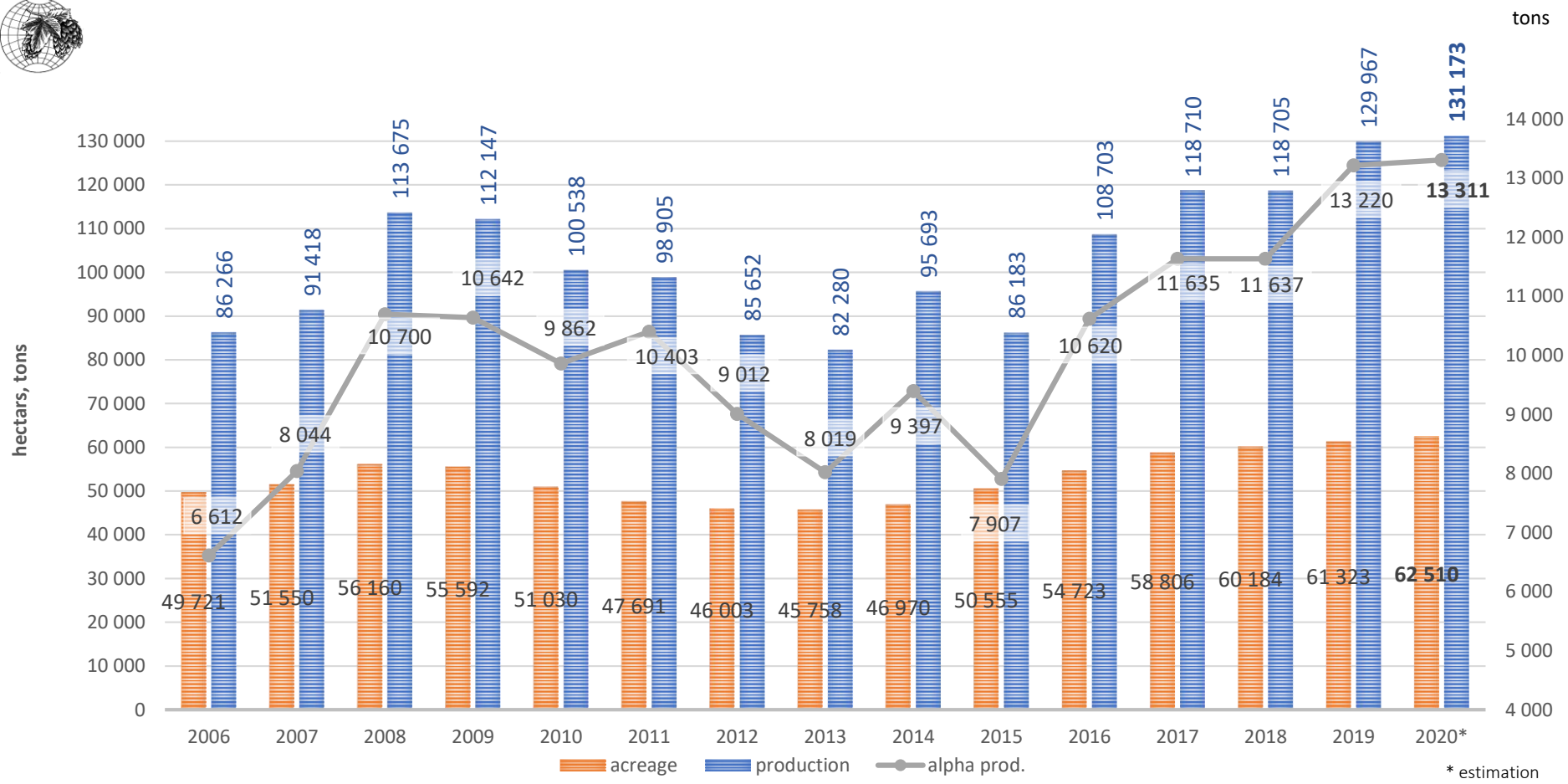
Country	Hop Acreage 2019 (Hectares, Ha)					Hop Production 2019 (in MT = 1.000 kg)				Alpha acid Prod. MT	Hop Acreage 2020 (Hectares, Ha) estimations					Hop Production 2020 (in MT = 1.000 kg) estimations				Alpha acid Prod. MT
	Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	Aroma		Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	MT		
Argentina <sup>°</sup>	100	60	160	0	160	110	50	160	10	100	60	160	0	160	110	50	160	10		
Australia	476	176	652	48	700	1 385	260	1 645	224	548	152	700	43	743	1 478	236	1 714	255		
Austria <sup>°</sup>	194	58	253	3	253	368	124	492	38	194	58	253	3	253	368	124	492	38		
Belgium	124	58	182	0	182	172	124	296	24	124	58	182	0	182	165	115	250	19		
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	4 706	49	4 755	248	5 003	6 991	154	7 145	285	4 676	61	4 737	233	4 970	6 280	120	6 400	250		
France	440	26	466	39	505	728	94	822	25	431	32	462	38	500	750	75	825	33		
Germany	10 860	8 913	19 773	644	20 417	22 584	25 888	48 472	5 260	10 973	9 154	20 127	579	20 706	22 600	26 200	48 800	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**	598	145	743	331	743	780	239	1 019	100	598	145	743	331	743	1 000	250	1 250	115		
Poland	636	1 020	1 656	106	1 762	1 293	2 476	3 765	317	650	1 111	1 761	30	1 791	1 313	2 522	3 833	337		
Romania	75	185	260	3	263	90	105	195	19	75	188	263	6	272	100	160	260	24		
Russia <sup>°</sup>	168	74	242	12	254	200	150	350	20	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**	129	0	129	4	133	108	0	108	5	38	0	38	0	38	42	0	42	2		
Slovenia	1 500	21	1 521	75	1 596	2 502	70	2 572	130	1 380	23	1 403	78	1 480	2 230	70	2 300	120		
South Africa <sup>°</sup>	73	354	427	0	427	77	677	754	75	73	354	427	0	427	77	677	754	75		
Spain <sup>°</sup>	0	535	535	0	535	0	830	830	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	787	171	958	0	958	1 353	343	1 696	119	756	161	917	0	917	1 100	300	1 400	99		
USA	18 005	5 842	23 847	468	23 847	35 160	16 115	51 275	5 755	19 682	5 272	24 954	1 677	24 954	38 380	14 762	53 142	5 900		
<b>IHGC</b>	<b>39 852</b>	<b>20 283</b>	<b>60 144</b>	<b>1 981</b>	<b>61 323</b>	<b>75 256</b>	<b>54 699</b>	<b>129 967</b>	<b>13 220</b>	<b>41 447</b>	<b>20 034</b>	<b>61 489</b>	<b>3 030</b>	<b>62 510</b>	<b>77 548</b>	<b>53 641</b>	<b>131 173</b>	<b>13 311</b>		

<sup>°</sup> Since no country updates were available, figures from Bariloche, Argentina in 2020 were used.

\*\* EC IHGC est

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

Difference $\Sigma$ 2020-2019	1 595	-249	1 345	1 049	1 187	2 292	-1 058	1 206	91
Difference $\Sigma$ 2020-2015	9 631	3 306	12 845	-1 812	11 955	32 038	12 968	44 990	5 404
Difference $\Sigma$ 2020-2010	17 134	-5 931	11 211	2 223	12 232	39 935	-9 284	30 635	3 449





# International Hop Growers' Convention

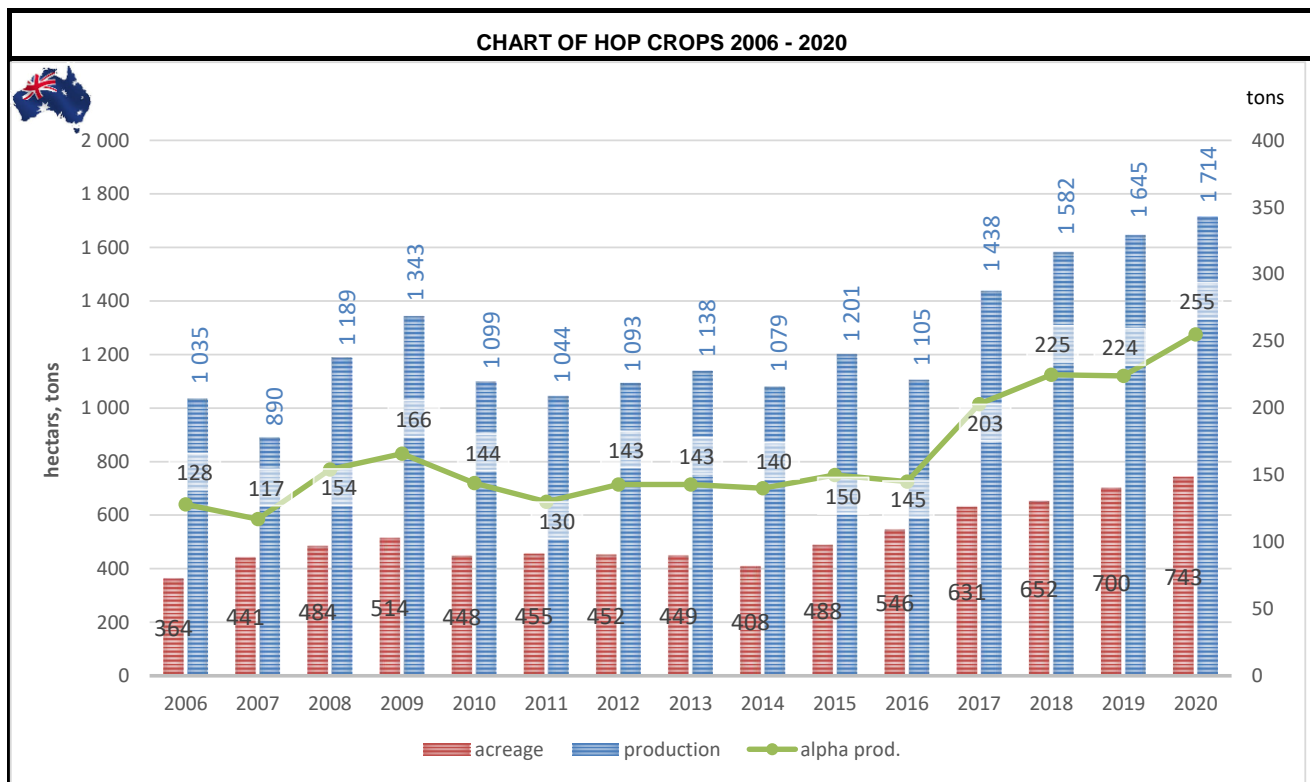
IHGC-Economic Committee: August 2020 Video-Call

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

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	90	86	73	55	50	40

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% 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 2020	Main O-varieties
O-Hop Area (Ha)			
O-Production (MT)			

Country, Date:  
Australia, 16.07.2020

Member Organization(s):  
BarthHaas GmbH & Co. KG



# International Hop Growers' Convention

IHGC-Economic Committee: August 2020 - Video-Call

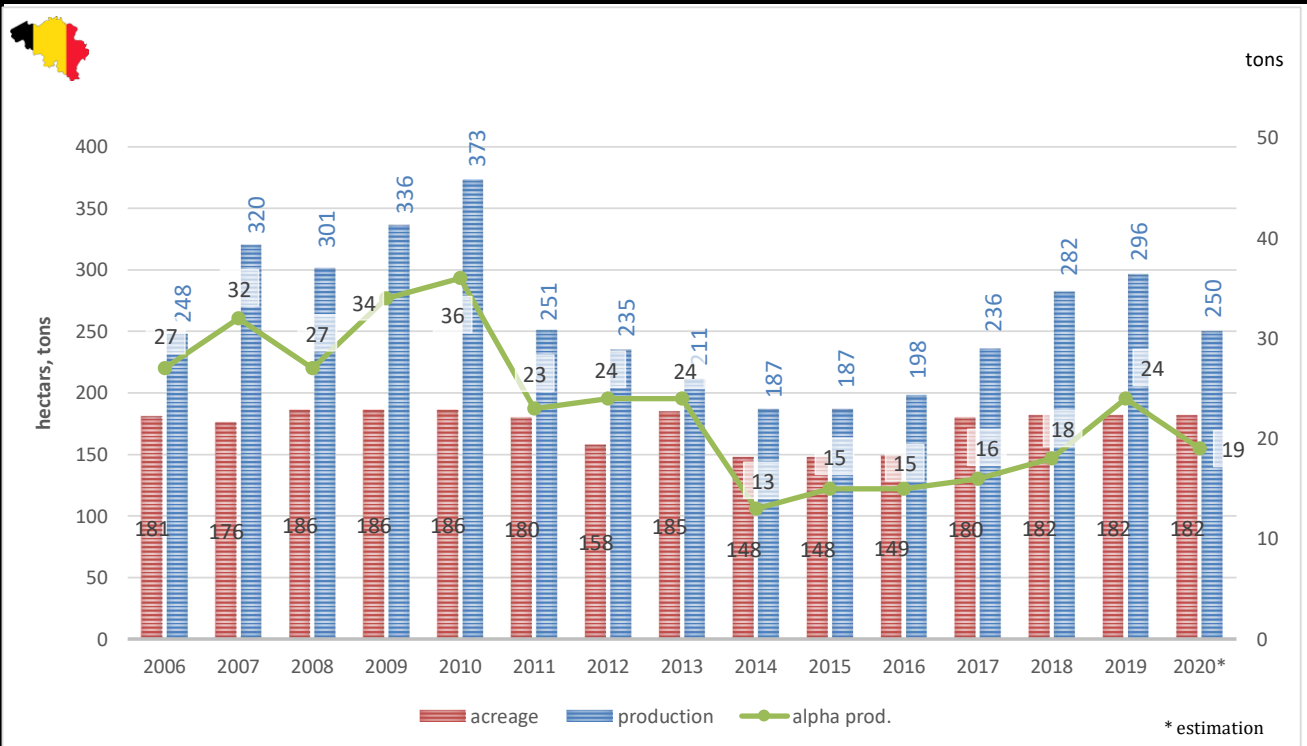
Country:  
**Belgium**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% 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 2006 - 2020\*



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

	Year N-1	Year N 2020
O-Hop Area (Ha)	15,1	15,1
O-Production (MT)	20,00	20,00

### Main O-varieties

Golding      Pilgrim      Cascade  
WGV          Challenger      Fuggles

Country, Date:

Belgium

07.08.2020

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

Joris Cambie





# International Hop Growers' Convention

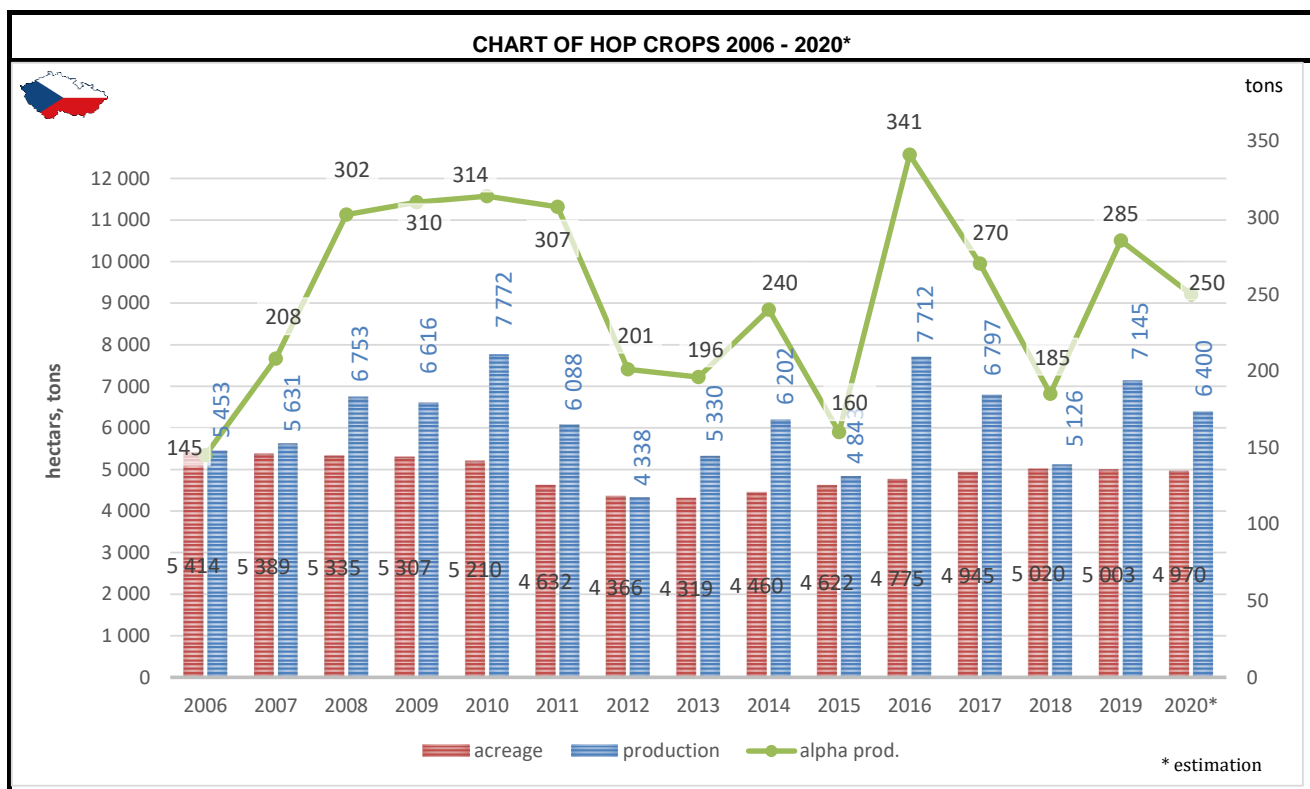
IHGC-Economic Committee: August 2020 - Video Call

Country: <b>Czech Republic</b>
-----------------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	100	100	100	90	85	70

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% 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>					



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

	Year N-1	Year N 2020
O-Hop Area (Ha)	10,55	10,55
O-Production (MT)	12,00	6,00

Main O-varieties  
Saaz  
Premiant

Country, Date:  
21.02.2020

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



# International Hop Growers' Convention

Country:

France

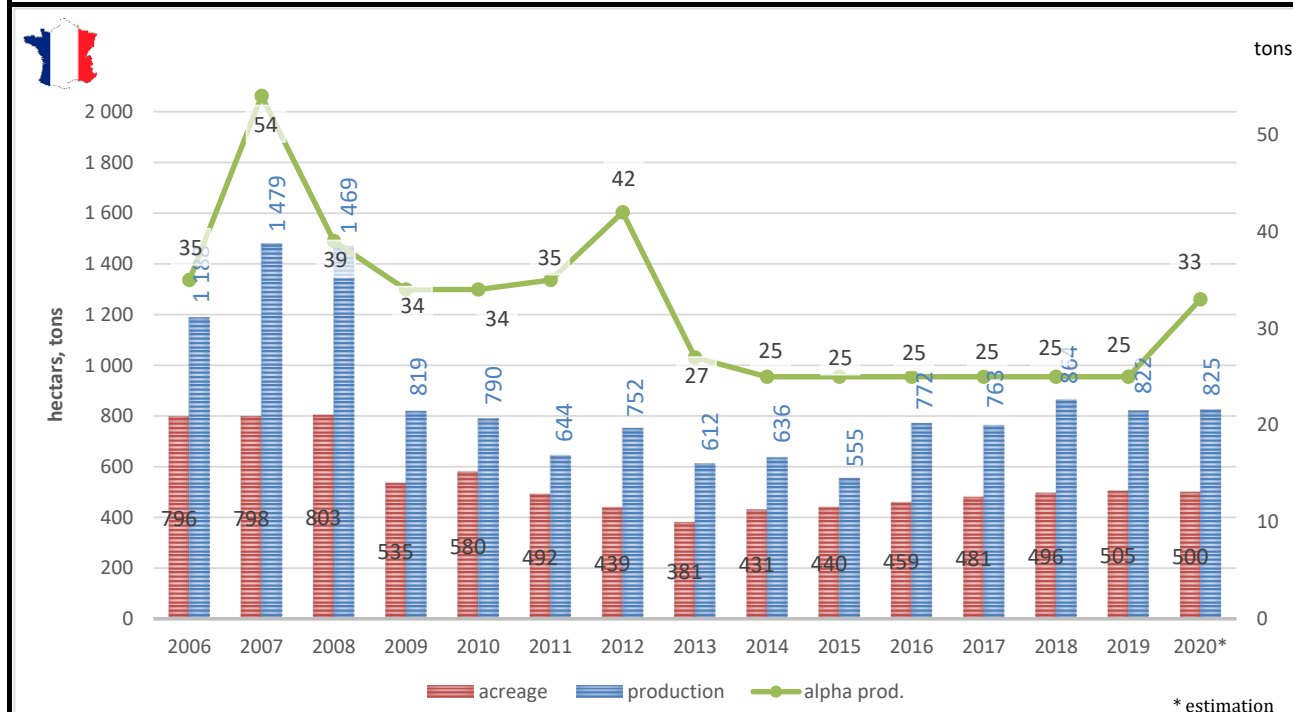
IHGC-Economic Committee: August 2020 - Video-Call

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	95	90	80	70	60	60

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% 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 2006 - 2020\*



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

	Year N-1	Year N 2020
O-Hop Area (Ha)	19,2	30,0
O-Production (MT)	28,1	45,0

### Main O-varieties

Strisselspalt  
Aramis

Country, Date:  
August 7, 2020

Member Organization(s):  
AGPH



# International Hop Growers' Convention

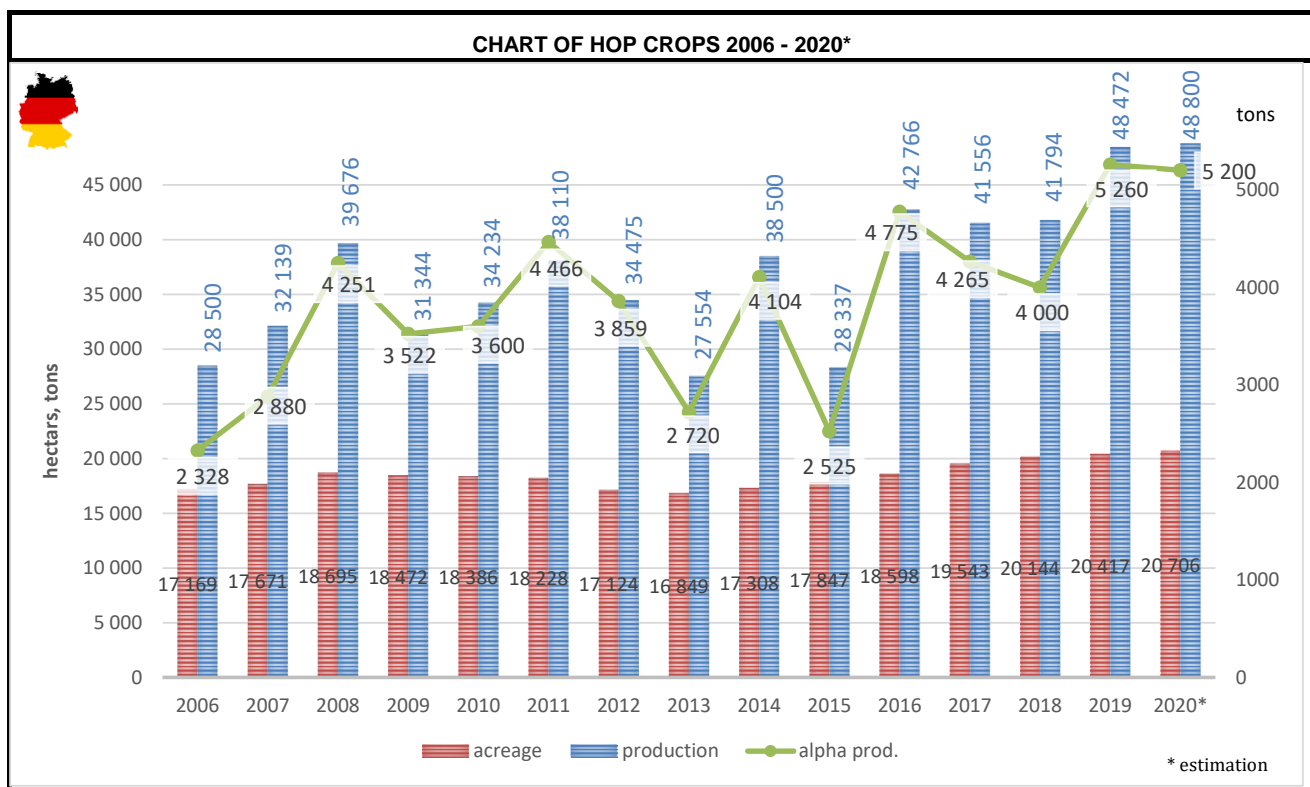
IHGC-Economic Committee: August 2020 - Video-Call

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

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
<b>Situation</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Metric tons	43 506	40 891	39 850	36 920	32 820	30 667
% Crop / Year N	89	84	82	76	67	63

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	7,86	9,26		17,80	Farmer Price
Alpha Hops	7,59	10,24		34,90	Farmer Price
Average Price	7,77	9,69		24,70	Farmer Price
<b>Contract Prices</b>					
Aroma Hops	6,02	6,36		5,60	Farmer Price
Alpha Hops	4,84	5,26		8,70	Farmer Price
Average Price	5,37	5,75		7,10	Farmer Price
<b>Average Prices</b>					
Aroma Hops	6,23	6,83		9,60	Farmer Price
Alpha Hops	4,97	5,8		16,70	Farmer Price
<b>AVERAGE</b>	5,58	6,28		12,50	Farmer Price



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

	Year N-1	Year N 2020
O-Hop Area (Ha)	140	170
O-Production (MT)	190	230

Main O-varieties

HAT/PER/SSE

Country, Date:  
Germany

05.08.2020

Verband deutscher Hopfenpflanzer  
gez. Brunner



# International Hop Growers' Convention

IHGC-Economic Committee: August 2020 - Video-Call

Country:

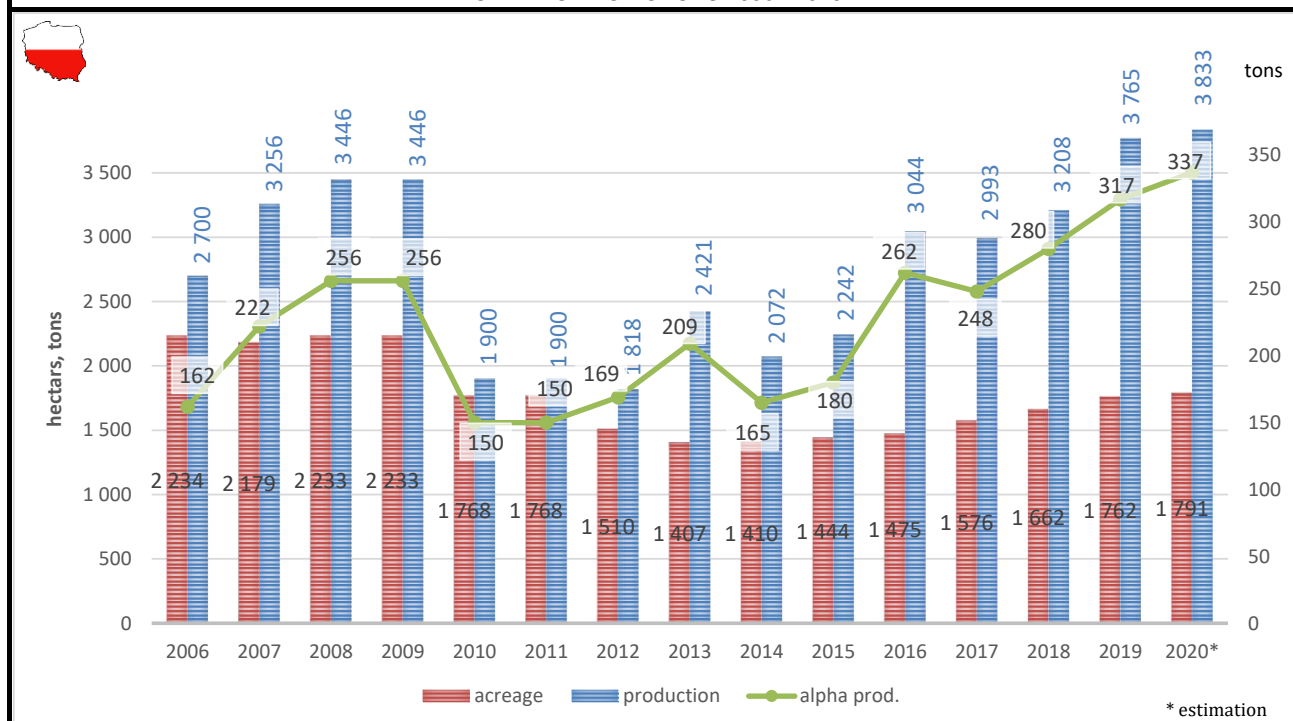
**Poland**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	85-90%	75%	50%	30%	30%	

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	4,65	4,9			Farmers price
Alpha Hops	5,81	5,9			Farmers price
Average Price	5,23	5,4			Farmers price
<b>Contract Prices</b>					
Aroma Hops	4,65	4,65	4,6		Farmers price
Alpha Hops	4,19	4,19	4,4		Farmers price
Average Price	4,42	4,42	4,5		Farmers price
<b>Average Prices</b>					
Aroma Hops	4,65	4,77			Farmers price
Alpha Hops	5	5,1			Farmers price
<b>AVERAGE</b>	4,83	4,91			Farmers price

CHART OF HOP CROPS 2006 - 2020\*



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

Overall 680 hop growers in Poland. Average size of plantations is 2,59 ha. Marynka (MAR) is a variety recognized as bitter in Poland, while treated as aroma by IHGC - it may cause some differences. Numbers in report come from official report from Ministry of Agriculture in Poland (excluding estimations).

	Year N-1	Year N 2020	Main O-varieties		
O-Hop Area (Ha)	9,5	11,5	HMG	MAR	PUL
O-Production (MT)	11,00	11,00	MGN	CAS	

(2ha in conversion)

Country, Date: 26.05.2020 Poland  
05.08.2020

Member Organization(s): Jan Szalas  
ZPPCh





# International Hop Growers' Convention

Country:

**Romania**

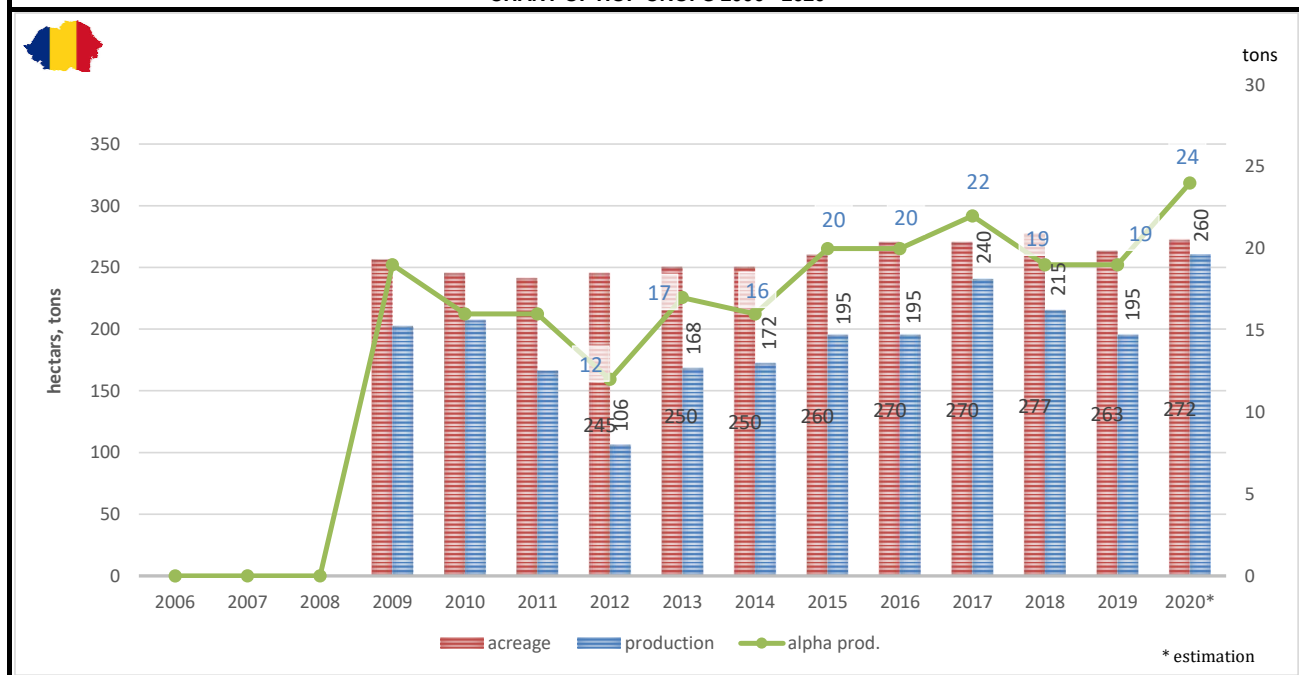
IHGC-Economic Committee: August 2020 - Video-Call

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons	280	300	320	330	340	350
% Crop / Year N	100	100	100	100	100	100

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% 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 2006 - 2020\*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2020	Main O-varieties
O-Hop Area (Ha)			
O-Production (MT)			

Country, Date:

03.08.2020

Member Organization(s):  
MORA ACATIU ERVIN

*Ervin*



# International Hop Growers' Convention

Country:

**Slovenia**

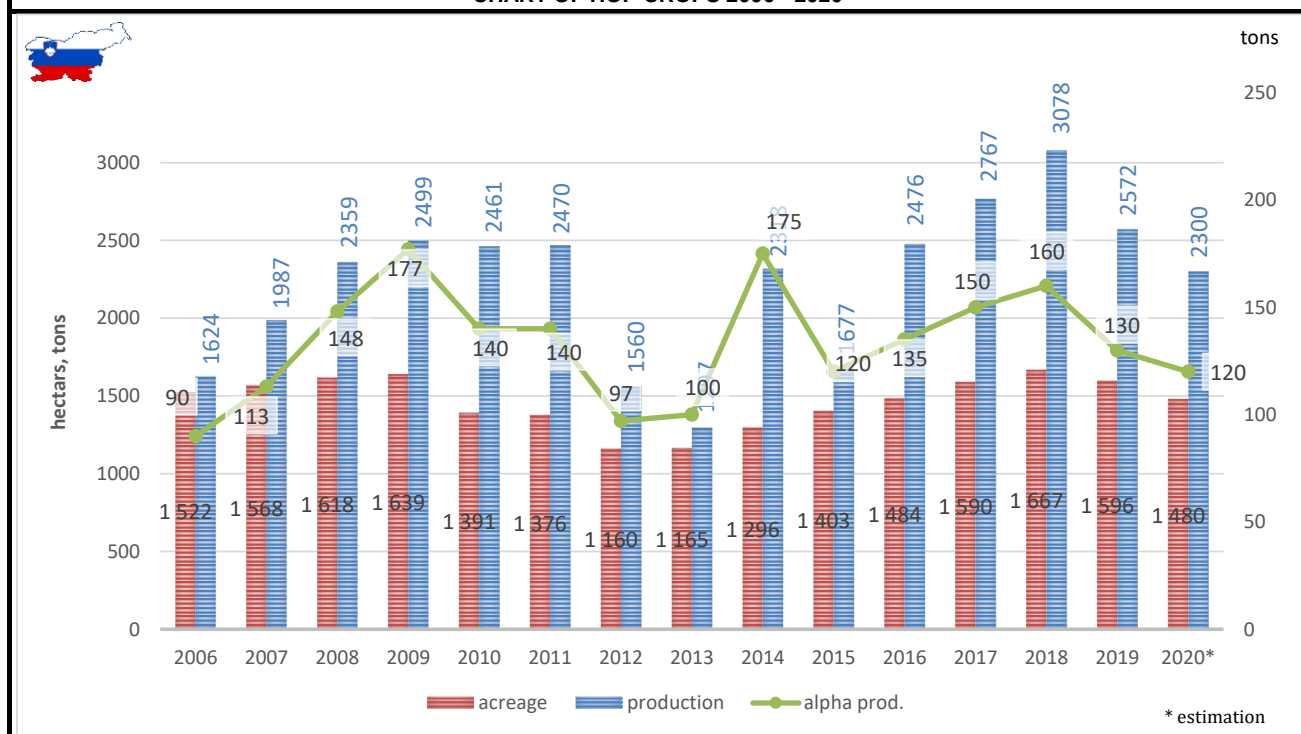
IHGC-Economic Committee: August 2020 - Video-Call

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	90	80	75	70	N.A	N.A.

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				0
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% 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>	7	7,5			
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

CHART OF HOP CROPS 2006 - 2020\*



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

	Year N-1	Year N 2020
O-Hop Area (Ha)	1	1
O-Production (MT)		

Main O-varieties  
Styrian Gold

Country, Date:  
Slovenia, August 5, 2020

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



# International Hop Growers' Convention

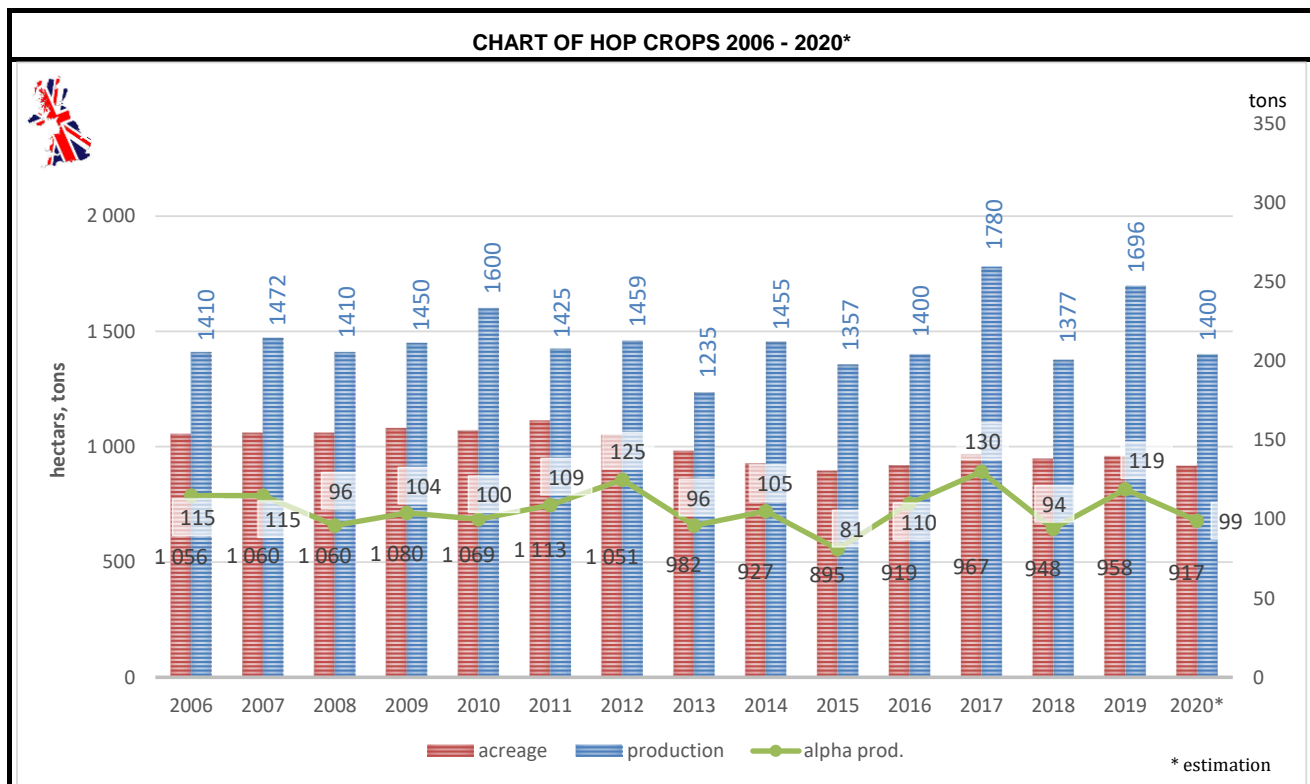
IHGC-Economic Committee: August 2020 - Video-Call

Country: <b>UK</b>
-----------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	70	40	25	20	10	

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops		0	0	
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% 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 2020	Main O-varieties
O-Hop Area (Ha)	4,6	5,6	
O-Production (MT)	1,80	1,80	

Country, Date:  
UK 06/08/2020

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

# International Hop Growers' Convention

IHGC-Economic Committee: August 2020 - Video-Call

Country:

**USA**

Hop Area (Ha = Hectares)	Year N-1 2019	Year N 2020 (estimate)	Difference N - (N-1)	Difference %
Aroma	18 005	19 682	1 677	9,3%
Alpha	5 842	5 272	-570	-9,8%
Total	23 847	24 954	1 107	4,6%

New Hop Area (Ha)	Year N-1 2019	Year N 2020 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2019	Year N 2020 (estimate)	Difference N - (N-1)	Difference %
Aroma	18 005	19 682	1 677	9,3%
Alpha	5 842	5 272	-570	-9,8%
Total	23 847	24 954	1 107	4,6%

Production MT=Metric Tons	Year N-1 2019	Year N 2020 (estimate)	Difference N - (N-1)	Difference %
Aroma	35 160	38 380	3 220	9,16%
Alpha	16 115	14 762	-1 353	-8,40%
Total	51 275	53 142	1 867	3,64%

Yield MT/Ha	Year N-1 2019	Year N 2020 (estimate)	Difference %
Aroma	1,95	1,95	-0,14%
Alpha	2,76	2,80	0,00%
Total	2,15	2,13	-0,96%

Alpha Prod.	Year N-1	2019	Year N	2020	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		EBC %	(estimate)	EBC %		%
Aroma						
Alpha						
Total	5 755	11,2%	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)
<b>Aroma</b>						
Amarillo®, VGXP01	874	855	-19			
Cascade	2 137	1 618	-519			
Centennial	1 468	1 166	-302			
Chinook	958	775	-183			
Citra®, HBC 394	3 656	4 533	877			
El Dorado®	389	650	261			
Mosaic®, HBC 369	1 710	2 250	540			
Sabro™, HBC 438	274	476	202			
Simcoe®, YCR 14	1 766	1 675	-91			
Other PNW Aroma	3 550	4 701	1 151			
Non-PNW Aroma	869	983	114			
<b>Total Aroma</b>	17 651	19 682	2031			
<b>Alpha</b>						
Apollo™	238	310	72			
CTZ	2 608	2 545	-63			
Eureka!™	172	282	110			
Galena	166	98	-68			
Nugget	475	375	-100			
Pahto® HBC 682	839	875	36			
Summit™	434	259	-175			
Super Galena™	223	228	5			
Other PNW Alpha	296	191	-105			
Non-PNW Alpha	97	109	12			
<b>Total Alpha</b>	5 548	5 272	-276			

# International Hop Growers' Convention

IHGC-Economic Committee: August 2020 - Video-Call

Country: <b>USA</b>
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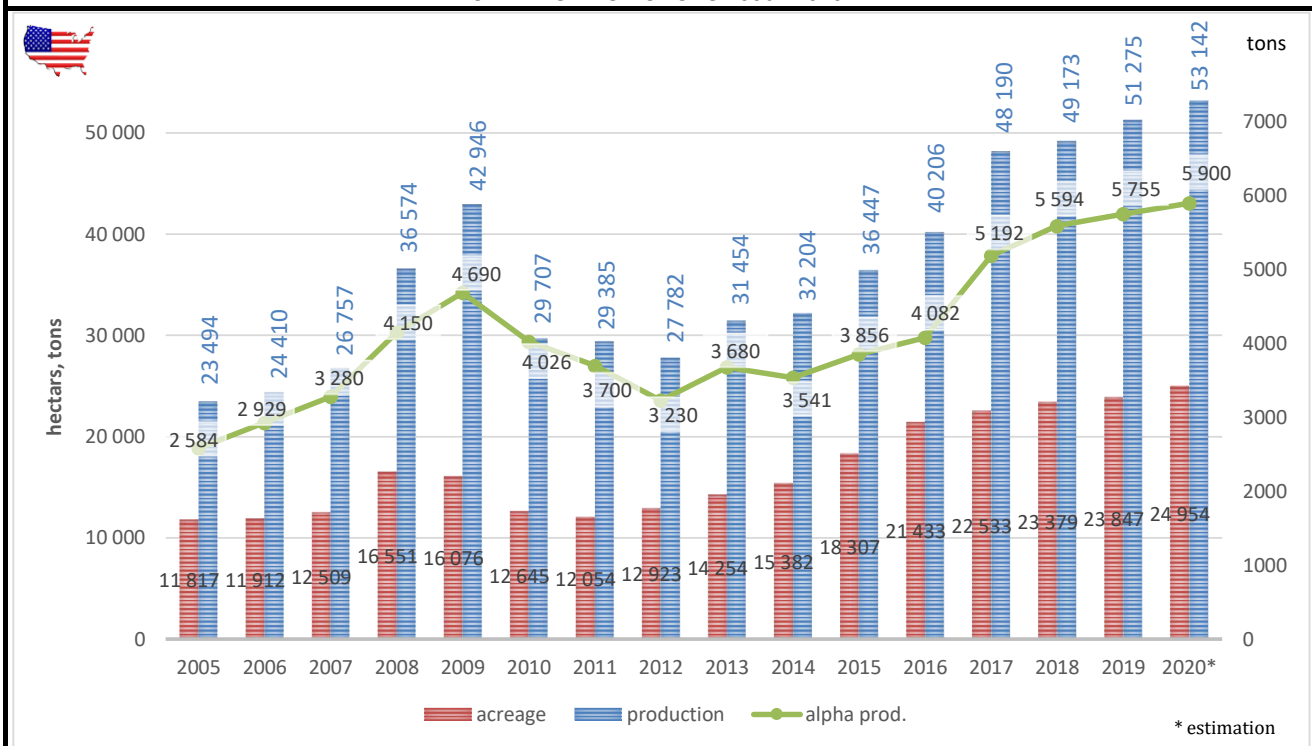
Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	98%	95%	80%	60%	40%	25%

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% 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	11.52 Euro/kg			

Average USD/lb.                      \$5,60                      \$5,68

CHART OF HOP CROPS 2006 - 2020\*



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

Exchange rate \$1 USD = 0.92 Euro (15 Feb 2020). 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).

	Year N-1	Year N 2020	
O-Hop Area (Ha)	215	328	27% increase
O-Production (MT)			

Main O-varieties

A total of 10 Pacific Northwest hop growers reported Organic hops

Country, Date: USA

VIII.20

Member Organization(s):  
Hop Growers of America