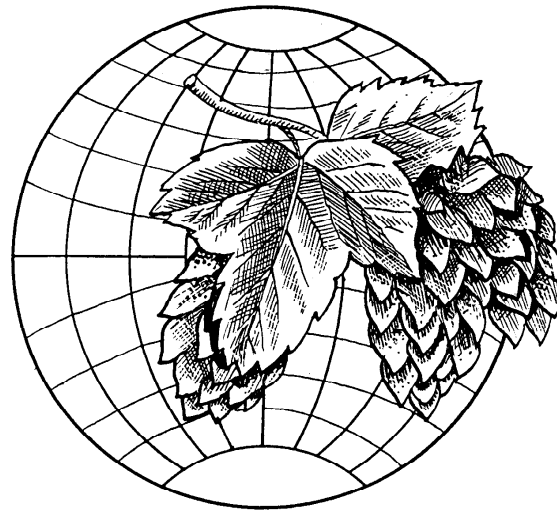


INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

PARIS, FRANCE
APRIL, 2016



International Hop Growers' Convention

IHGC - Economic Commission Summary Reports

Paris, France - April, 18, 2016

Country	Hop Acreage 2015 (Hectares, Ha)					Hop Production 2015 (in MT = 1.000 kg)				Alpha acid Prod. MT	Hop Acreage 2016 (Hectares, Ha) estimations					Hop Production 2016 (in MT = 1.000 kg) estimations				Alpha acid Prod. MT
	Aroma	Alpha	Hop area ¹	New	Total	Aroma	Alpha	Total	MT		Aroma	Alpha	Hop area ¹	New	Total	Aroma	Alpha	Total	MT	
Australia**	88	400	488	0	488	200	1 001	1 201	150	88	400	488	0	488	100	650	750	90		
Austria	187	58	245	4	249	219	79	298	20	187	58	245	3	248	310	120	430	39		
Belgium	82	66	148	0	148	103	106	209	15	89	60	149	7	156	115	110	225	17		
China*	300	2 270	2 570	0	2 570	300	5 700	6 000	440	300	2 200	2 500	0	2 500	300	5 700	6 000	440		
Czech Republic	4 149	43	4 192	430	4 622	4 764	79	4 843	130	4 347	43	4 390	360	4 750	5 915	85	6 000	240		
France	364	49	413	27	440	491	64	555	25	403	37	440	14	453	680	60	740	23		
Germany	9 675	7 019	16 694	1 153	17 847	13 790	14 547	28 337	2 525	10 000	7 200	17 200	1 200	18 400	19 000	18 000	37 000	3 900		
New Zealand	328	60	388	0	388	600	140	740	70	360	52	412	0	412	679	115	794	75		
Poland	574	790	1 364	81	1 444	826	1 416	2 242	180	619	825	1 444	80	1 524	991	1 566	2 557	200		
Romania	63	187	250	20	270	57	138	195	20	68	202	270	12	282	75	165	240	25		
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	94	0	94	3	137	0	137	0	137	160	0	160	8		
Slovenia	1 203	25	1 228	175	1 403	1 630	40	1 677	175	1 378	25	1 403	125	1 528	2 500	50	2 550	200		
South Africa°	0	420	420	0	420	0	820	820	108	0	420	420	0	420	0	820	820	108		
Spain°	0	534	534	10	534	0	950	1 150	140	0	534	534	0	534	0	950	1 150	140		
Ukraine°	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30		
UK-England*	685	210	895	5	895	900	457	1 357	81	685	210	895	5	895	1 000	450	1 450	100		
USA	13 653	4 654	18 307	2 925	18 307	21 000	15 447	36 447	3 856	16 100	4 650	20 750	2 443	20 750	27 500	16 500	44 000	4 100		
IHGC	31 915	16 932	48 847	4 862	50 768	45 524	41 210	86 941	7 988	35 188	17 063	52 251	4 281	54 083	59 875	45 567	105 642	9 755		
Difference ∑ 2016-2015										3 273	131	3 404	-581	3 315	14 351	4 357	18 701	1 767		

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

¹ Acreage without new hop areas

* IHGC estimation

blue colored - correction from the meeting

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

Austria

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	10,5	4,8	21,7	7,0	11,2	106,4
Alpha	9,5	12,0	16,8	14,0	7,3	77,2
Total	20,0		38,5			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons	395	370				
% Crop / Year N	92	85				

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	6,5				
Alpha Hops	3,9				
Average Price					
Contract Prices					
Aroma Hops	6,5			#DIV/0!	Erzeugerpreis / kg RH
Alpha Hops	7,2			#DIV/0!	Erzeugerpreis / kg RH
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: 12.4.2016

Member Organization:

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country: Belgium

Hop Area (Ha = Hectares)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	82	89	7	
Alpha	66	60	-6	
Total	148	149	1	

New Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)
Aroma		7
Alpha		-6
Total		1

TOTAL Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	82	89		
Alpha	66	60		
Total	148	149		

Production MT=Metric Tons	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	102,57	115		
Alpha	106,03	110		
Total	208,60	225		

Yield MT/Ha	Year N-1 2015	Year N 2016 (estimate)	Difference %
Aroma		1,3	
Alpha		1,8	
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						
Golding						
Challenger						
Cascade						
Alpha						
Magnum						
Target						

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:
Belgium

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma			5,0	5,0		
Alpha			12,0	10,0		
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% 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 tendency of the last years is continuing.
Every year there is an increased demand for aroma hops

Belgium, Date: 13.4.2016

Member Organization(s):
Joris Cambie

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

Czech Republic

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	125,0		230,0			
Alpha	5,0		10,0			
Total	130,0		240,0		110,0	84,6

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N	100	100	100	95	90	

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops	6,5	6,8			farmer price
Alpha Hops	4	4,5			farmer price
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
5.4.2016

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

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

France

Hop Area (Ha = Hectares)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	364	403	39	110,7%
Alpha	49	37	-12	75,5%
Total	413	440	27	106,5%

New Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)
Aroma	27	27
Alpha	-	-
Total	27	14

TOTAL Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	403	430	27	106,7%
Alpha	37	23	-14	62,2%
Total	440	453	13	103,0%

Production MT=Metric Tons	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	491	680	189	138,5%
Alpha	64	60	-4	93,8%
Total	555	740	185	133,3%

Yield MT/Ha	Year N-1 2015	Year N 2016 (estimate)	Difference %
Aroma	1,2	1,6	1,3
Alpha	1,7	2,0	1,2
Total	1,3	1,7	1,3

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	185	5	1,20	2,00	
Aramis	46	48	2	5,10	5,80	
Tradition	32	31	-1	3,50	4,80	
Triskel	21	23	2	2,20	3,50	
Fuggle	38	41	3	2,70	4,60	
Golding	37	41	4	1,50	3,50	
Challenger	6	6	0	6,35	6,30	
Barbe-Rouge	2	9	7	6,60	6,00	
Mistral	5	6	1	4,64	5,50	
Alpha						
Columbus	9,3	5,5	-3,8	8,40	10,00	
Brewers Gold	10,8	12	1,2	4,00	5,50	
Nugget	16	6	-10	8,00	10,00	
Magnum	5	5	0	12,00	12,00	
Target	5	5,6	0,6	10,30	10,50	

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

France

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	17,2	3,2	17,0	2,5	-0,2	1,0
Alpha	7,8	7,4	6,0	10,0	-1,8	0,8
Total	25,0	3,9	23,0	3,0	-2,0	0,9

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N	75	70	60	55	45	45

Unsold Hops (MT) : Crop Year	2015	Aroma	Alpha	Total
Total Hop Production		491	64	555
- Sold Production		491	64	555
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% 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:
April 3, 2016

Member Organization(s):
AGPH
Francis Heitz

International Hop Growers' Convention

IHGC-Economic Commission: April 2016 - Paris, France

Country:

Germany

Hop area (ha)	Year N-1 2015	Year N 2016 estimate	Difference N - (N-1)	Difference %
Aroma	9675	10000	325	3,4
Alpha	7019	7200	181	2,6
Total	16694	17200	506	3,0

New Hop Area (ha)	Year N-1 2015	Year N 2016 estimate
Aroma	656	500
Alpha	497	700
Total	1153	1200

TOTAL Hop area (ha)	Year N-1 2015	Year N 2016 estimate	Difference N - (N-1)	Difference %
Aroma	10331	10500	169	1,6
Alpha	7516	7900	384	5,1
Total	17847	18400	553	3,1

Production MT	Year N-1 2015	Year N 2016 estimate	Difference N - (N-1)	Difference %
Aroma	13 790	19 000	5 210	37,8
Alpha	14 547	18 000	3 453	23,7
Total	28 337	37 000	8 663	30,6

Yield MT/HA.	Year N-1 2015	Year N 2016 estimate	Difference %
Aroma	1,3	1,8	35,6
Alpha	1,9	2,3	17,7
Total	1,6	2,0	26,6

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	3187	3150	-37	4,5	7,5	3
Hall. Tradition	2914	2900	-14	4,7	6,1	1,4
Hersbrucker	954	960	6	2,3	2,8	0,5
Hallertauer	746	700	-46	2,8	3,8	1
Tettnanger	744	740	-4	2,1	3,7	1,6
Spalter Select	533	530	-3	3,2	4,9	1,7
Saphir	423	450	27	2,5	4,1	1,6
Spalter	113	110	-3	2,2	3,7	1,5
Mand. Bavaria	207	250	43			0
Alpha						
Herkules	4152	4700	548	15,1	16,7	1,6
Hall. Magnum	2353	2000	-353	12,2	12,7	0,5
Hall. Taurus	465	320	-145	12,9	16,3	3,4
North. Brewer	238	240	2	5,4	8,9	3,5
Nugget	162	150	-12	9,2	9,9	0,7
Polaris	60	70	10			0
Hall. Merkur	26	20	-6			0
Brewers Gold	17	15	-2			0
Comet	5	5	0			0

International Hop Growers' Convention

IHGC-Economic Commission: April 2016 - Paris, France

Country:

Germany

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	estimate	%		%
Aroma	543,0	3,9	1100,0	5,8	557,0	1,9
Alpha	1982,0	13,6	2800,0	15,6	818,0	1,9
Total	2 525	8,9	3900,0	10,5	1375,0	1,6

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric Tons	33479	34804	34195	30239	27825	15654
% Crop / Year N	90	94	92	82	75	42

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production		13790,00	14 547	28 337
- Sold Production		13790,00	14 547	28 337
= Unsold Hops		0,00	0,00	0,00
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% Diff. 2015 vs. 2014	Kind of Price
Spot Prices					
Aroma Hops	5,61	9,09		62,00	Farmer Price
Alpha Hops	4,25	5,48		28,90	Farmer Price
Average Price	4,78	6,5		36,00	Farmer Price
Contract Prices					
Aroma Hops	4,8	4,92		2,50	Farmer Price
Alpha Hops	4,05	3,74		-7,70	Farmer Price
Average Price	4,45	4,34		-2,50	Farmer Price
Average Prices					
Aroma Hops	4,94	5,15		4,30	Farmer Price
Alpha Hops	4,1	3,97		-3,20	Farmer Price
AVERAGE	4,52	5,54		22,60	Farmer Price

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Verband deutscher Hopfenpflanzer

Germany

8.4.2016

gez. Brunner

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

New Zealand

Alpha Prod.	Year N-1	2015	Year N	2016	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	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production	794	680	114	
- Sold Production	715	612	103	
= Unsold Hops	79	68	11	
% unsold Hops	10			

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% 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 saw an increase in aroma/flavour designated hops. With Motueka now being second highest in production volume. Planted areas continue to increase and is set to develop further over the coming seasons with continuing decreases in Wakatu variety and increases in Nelson Savin, Motueka and additional specialty aroma types. New Zealand now grows 24 varieties 16 of which are unique to New Zealand. Unseasonable severe storm events during harvest created some loss in Nelson Sauvignon volumes with approx 20 % shortfall being recorded which will impact supply for 2016.

Market Conditions:

International market conditions remain favourable for New Zealand Hops entering 2016 harvest with a 95 % sold forward position. Expectation is that the crop will be sold prior to the 2017 harvest as only small amounts of spot hops remain available. Alpha markets remain problematic.

New Zealand Hops Ltd will publish their full report in due course and available @ www.nzhops.co.nz

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

Poland

Hop Area (Ha = Hectares)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	573,79	619,43		
Alpha	789,78	824,67		
Total	1363,57	1444,1		

New Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)
Aroma	45,64	40
Alpha	34,89	30
Total	80,53	80

TOTAL Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	619,43	669,43		
Alpha	824,67	854,67		
Total	1444,1	1524,1		

Production MT=Metric Tons	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	826	991		
Alpha	1 416	1 566		
Total	2 242	2 557		

Yield MT/Ha	Year N-1 2015	Year N 2016 (estimate)	Difference %
Aroma	1,4	1,6	
Alpha	1,8	1,9	
Total	1,6	1,8	

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	392,7	432,7	40			
Lomik	4,14	4,14	0			
Perle	61,1	61,1	0			
Sybilla	79,97	79,97	0			
HT	79,52	79,52	0			
Puławski	0,83	0,83	0			
Cascade	1,17	1,17	0			
Alpha						
Marynka	293,26	293,26	0			
Magnum	501,62	501,62	0			
Iunga	4,98	4,98	0			
Klony hodowlane	2,35	2,35	0			
Taurus	8,22	8,22	0			
Magnat	13,68	43,68	30			
Oktawia	0,56	0,56	0			

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

Poland

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	32,4	3,9				
Alpha	148,0	10,5				
Total	180,4	8,0				

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production		825,82	1416,19	2242,01
- Sold Production		825,82	1416,19	2242,01
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	4,08	7			
Alpha Hops	3,3	4,65			
Average Price	3,69	5,83			
Contract Prices					
Aroma Hops	3,36	4,47			
Alpha Hops	2,93	3,54			
Average Price	3,15	4			
Average Prices					
Aroma Hops	3,72	5,73			
Alpha Hops	3,12	4,1			
AVERAGE	3,42	4,92			

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
Poland, 12.04.2016

Member Organization(s):
Polish Hop Growers Association

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

Romania

Hop Area (Ha = Hectares)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	63	68	5	7,9
Alpha	187	202	15	8,0
Total	250	270	20	8,0

New Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)
Aroma	5	7
Alpha	15	5
Total	20	12

TOTAL Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	68	75	7	10,3
Alpha	202	207	5	2,5
Total	270	282	12	4,4

Production MT=Metric Tons	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	57	75	18	31,6
Alpha	138	165	27	19,6
Total	195	240	45	23,1

Yield MT/Ha	Year N-1 2015	Year N 2016 (estimate)	Difference %
Aroma	0,90	1,10	22,1
Alpha	0,74	0,82	27,1
Total	0,78	0,89	25,6

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	38	45	7	9,2	9,0	-0,2
Huller Bitter	30	30	0	7,8	7,5	-0,3
	68	75	7			
Alpha						
Magnum	93	98	5	12,2	13,0	0,8
Merkur	29	29	0	12,5	13,0	0,5
Brewers Gold	80	80	0	8,1	7,7	-0,4
	202	207	5			

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

Romania

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	5,1	8,9	6,3	8,4	1,2	23,5
Alpha	15,0	10,9	18,2	11,0	3,2	21,3
Total	20,1	10,3	24,5	10,2	4,4	21,9

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons	250	270	290	290	300	
% Crop / Year N	78	89	90	100	100	

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production		57	138	195
- Sold Production		57	138	195
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% 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:
5-dub-2016

Member Organization(s):
MORA ACATIU ERVIN

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

Slovakia

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	3,0		8,0		5,0	166,7

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N	100	100	100			

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops		7			farmer price
Alpha Hops					farmer price
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
5.4.2016

Member Organization(s):
Marian Menšík

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

Slovenia

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	175,0		200,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N	85	75	70	50		

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production				1677
- Sold Production				1677
= Unsold Hops				0
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% 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	5,4	4,5 - 6,0			
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

A demand for the Styrian aroma hops made some growers enlarging their acreage. Furthermore, a recorded interest for flavour hops of the Slovenian origine is reflected in increasing the hop acreage with new flavour varieties, such as Styrian Wolf and Styrian Cardinal..

Country, Date:
Slovenia, April 12, 2016

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

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country:

UK

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	80,5	5,6	100,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N	100	100	100	100		

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					farmer price
Alpha Hops					farmer price
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Variety breakdown enclosed (T. Redsell).

Country, Date:

8.4.2016

Member Organization(s):

Hop Crop 2015

Variety	Total Hectares	Total Zentners	Zentners/Hectare	Average a.a.%	Total a.a. in Kilos	a.a./Hectare
Admiral	29,91	818,52	27,37	12,51	5118,08	171,12
Beata	0,30	2,00	6,67	0,00	0,00	0,00
Boadicea	7,44	165,64	22,26	5,24	434,15	58,35
Bramling X	46,07	1296,27	28,14	4,43	2870,16	62,30
Brewers Gold	0,00	1,00	0,00	7,08	0,00	3,52
Bullion	1,30	24,60	18,92	5,65	69,52	53,48
Cascade	8,24	278,76	33,83	2,63	367,02	44,54
Challenger	52,94	1958,88	37,00	6,75	6612,30	124,90
UK Chinook	1,60	11,78	7,36	8,91	52,48	32,80
E K Goldings	97,51	3027,57	31,05	5,90	8937,86	91,66
Endeavour	4,00	120,28	30,07	9,22	554,78	138,70
Epic	0,00	28,00	0,00	3,78	0,00	0,00
Experimental	0,43	0,38	0,88	9,54	1,81	4,22
First Gold	99,56	2475,38	24,86	5,23	1525,08	15,32
Flyer	0,12	15,63	130,25	7,58	0,00	0,00
Fuggles	83,52	2478,54	29,68	5,10	6324,48	75,72
Goldings	121,94	3701,46	30,35	5,21	9645,65	79,10
Jester	4,32	162,00	37,50	8,50	688,50	159,38
Kent Goldings	2,04	88,42	43,34	6,49	286,92	140,65
Keyworth Mid	0,00	6,00	0,00	7,17	0,00	0,00
Keyworth Early	0,00	1,00	0,00	0,00	0,00	0,00
Magnum	0,00	0,00	0,00	0,00	0,00	0,00
Northdown	15,56	580,65	37,32	8,08	2345,00	150,71
Olicana	1,62	56,00	34,57	0,00	0,00	0,00
Phoenix	0,80	31,00	38,75	9,00	139,50	174,38
Pilgrim	68,44	2199,58	32,14	6,62	7279,69	106,37
Pilot	4,40	113,65	25,83	9,50	539,77	122,67
Pioneer	5,12	97,59	19,06	7,14	348,29	68,03
Progress	59,83	2167,29	36,22	6,68	7240,84	121,02
Sovereign	55,78	1232,01	22,09	1,11	684,76	12,28
Sussex Hop	0,60	26,00	43,33	6,97	90,58	150,97
Target	79,99	2869,62	35,87	10,25	14708,90	183,88
Toyomodori	0,12	2,94	24,50	7,09	10,42	86,85
WGV	33,97	981,85	28,90	7,00	3436,18	101,15
EXP	0,61	3,00	4,92	0,00	0,00	0,00
Org. Target	1,36	23,36	17,18	12,29	143,55	105,55
Org. First Gold	2,00	0,00	0,00	0,00	0,00	0,00
Exp A	0,81	35,03	43,52	3,52	0,00	0,00
Exp B	1,62	6,00	3,70	0,00	0,00	0,00
Exp C	0,81	42,73	53,08	5,00	0,00	0,00
TOTAL	894,67	27130,41			80456,26	

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country: USA

Hop Area (Ha = Hectares)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	13 653	16 100	2 447	17,9%
Alpha	4 654	4 650	-4	-0,1%
Total	18 307	20 750	2 443	13,3%

+2,198 for Pacific Northwest and
+245 ha for other states.

New Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	13 653	16 100	2 447	17,9%
Alpha	4 654	4 650	-4	-0,1%
Total	18 307	20 750	2 443	13,3%

Includes 750 ha outside of Pacific Northwest

Production MT=Metric Tons	Year N-1 2015	Year N 2016 (estimate)	Difference N - (N-1)	Difference %
Aroma	21 000	27 500		
Alpha	15 447	16 500		
Total	36 447	44 000		

Yield MT/Ha	Year N-1 2015	Year N 2016 (estimate)	Difference %	Pounds/Acre
Aroma	1,54	1,71		1 524
Alpha	3,32	3,55		3 166
Total	1,99	2,12		1 892

Individual 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				8,6%		
ADHA-483 Azacca™	73	220	147			
ADHA-881 Jarrylo™	49	49	0			
ADHA-871 Pekko™	8	48	40			
Cascade	2 800	2 800	0			
Centennial	1 930	2 000	70			
Citra® (HBC 394)	1 169					
Chinook	700	675	-25			
El Dorado	181	278	97			
Mosaic™ (HBC 369)	724	916	192			
Simcoe® (YCR 14)	1 322	1 500	178			
Willamette	575	570	-5			
Alpha				14,2%		
Apollo™	402	402	0			
Bravo™	295	300	5			
CTZ	2 160	2 000	-160			
Nugget	662	600	-62			
Summit™	685					
Super Galena™	206					

International Hop Growers' Convention

IHGC-Economic Committee: April 2016 - Paris, France

Country: USA

Alpha Prod.	Year N-1	2015	Year N	2016	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	3 856	10,6				

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N	98	98	98	80	80	50

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2014	Year (N-1) 2015	Year (N) 2016	% 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\$3.67/lb	US\$4.38/lb			
	7.10 Euro/kg	8.47 Euro/kg			

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate \$1 USD = 0.878 Euro (5 April 2016)

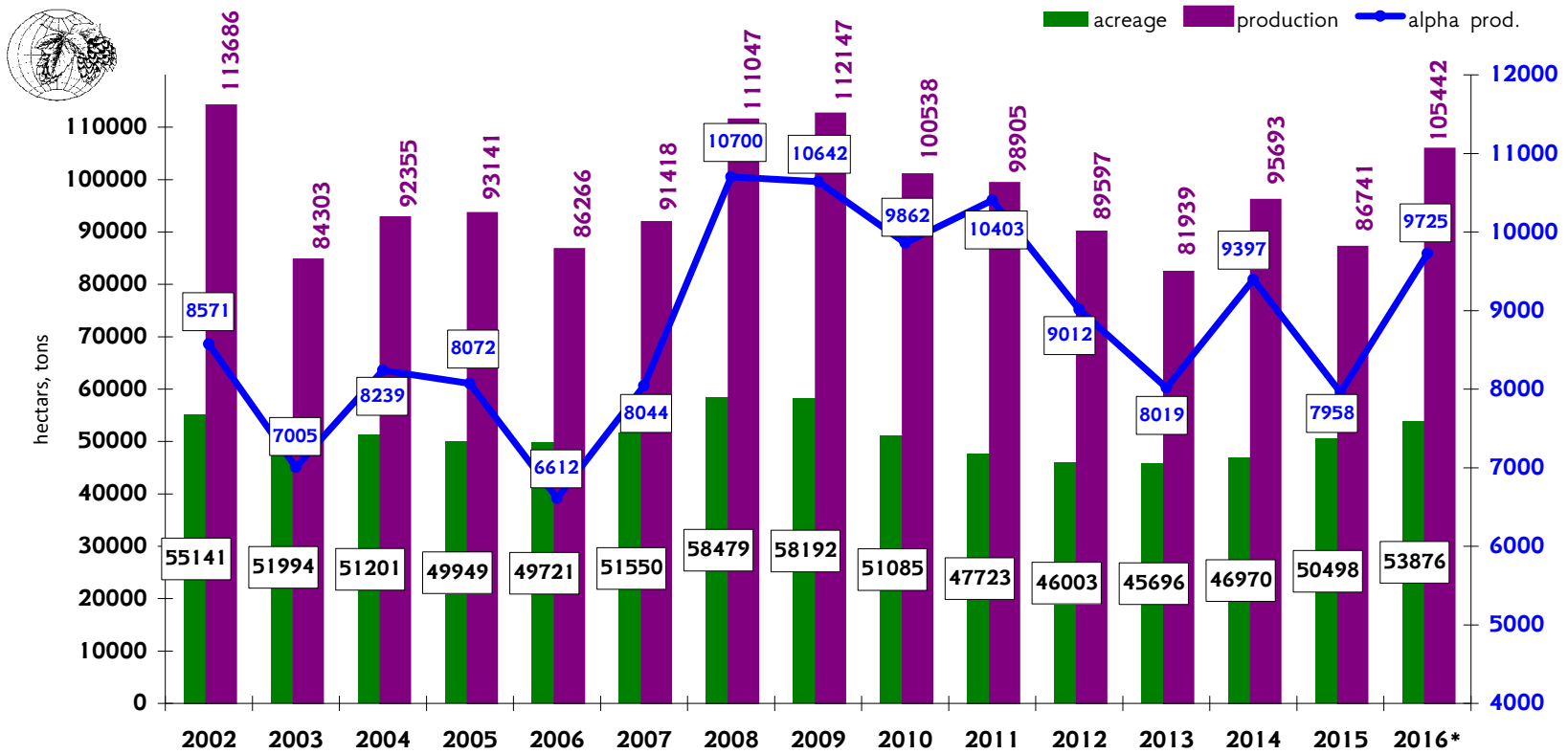
Alpha and aroma variety totals are based on the IHGC list of World Hop Varieties. Those varieties classified as "Dual" are included in the Aroma category for consistency. Varieties listed in the "Other" category in the US statistical reports produced by USDA-NASS are included in Aroma. This insures that 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:
USA

IV.16

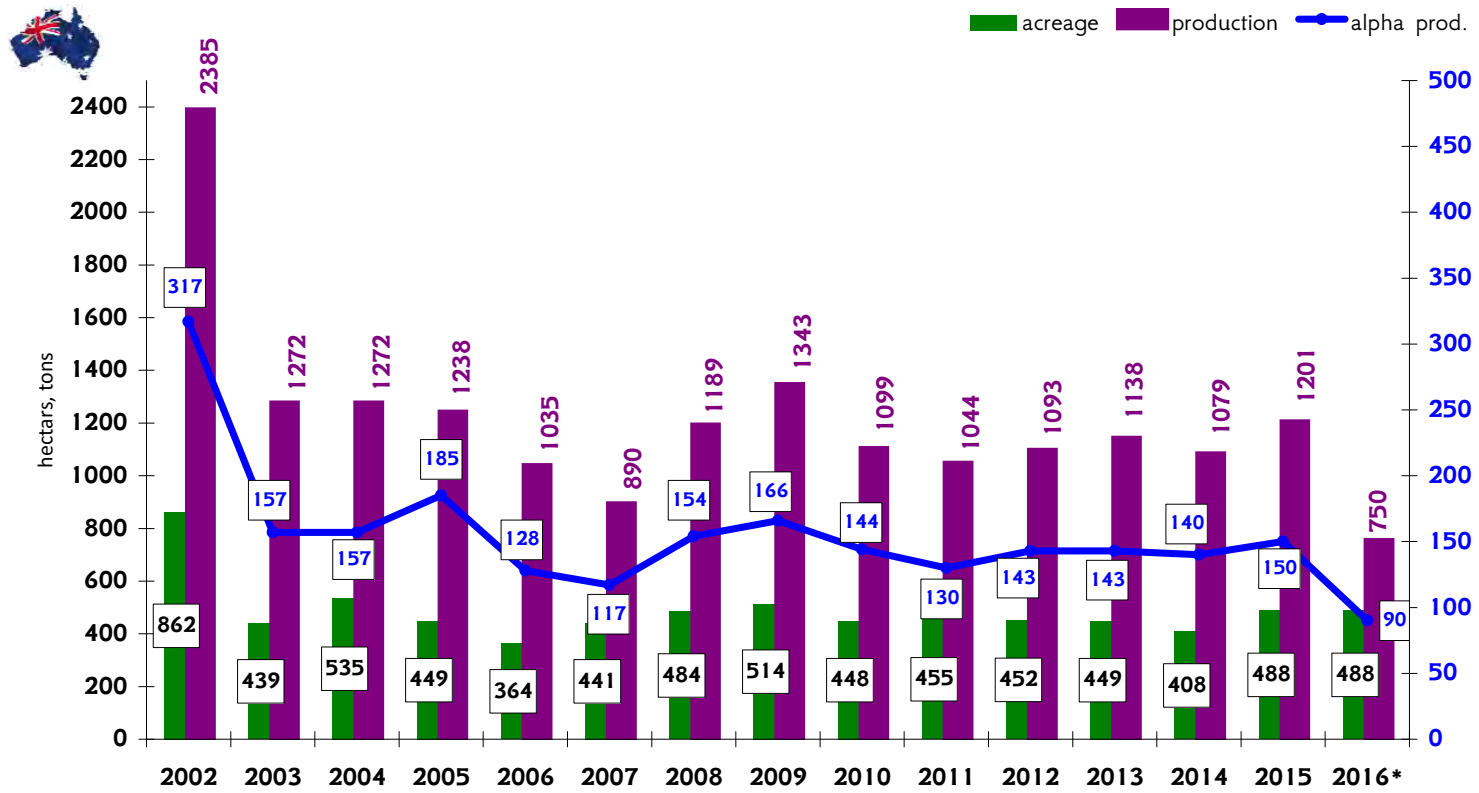
Member Organization(s):
Hop Growers of America

Figure 1: Comparison of IHGC crops 2002 - 2016* (acreage, production, alpha acids production)



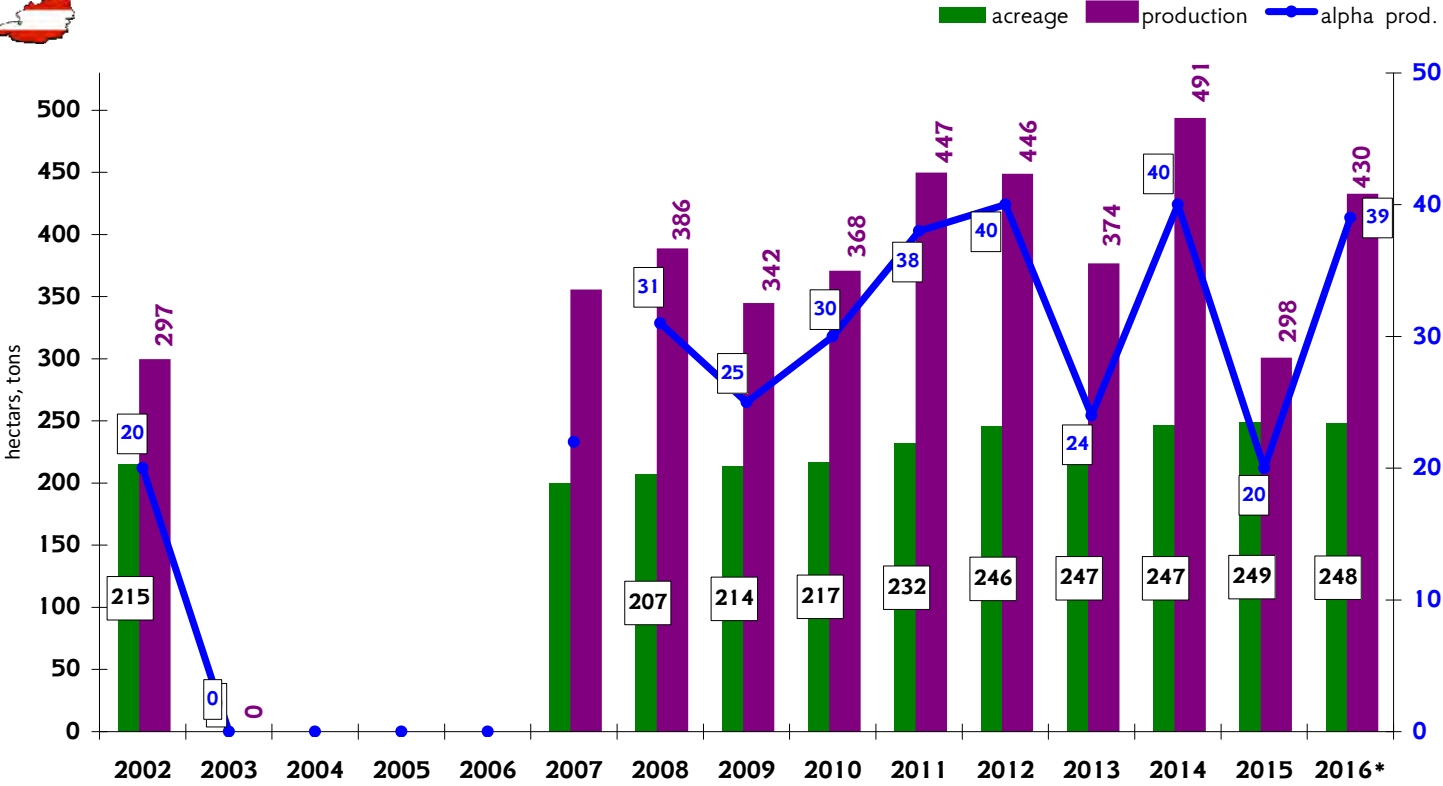
* estimation

Figure 2: Australia hop crop 2002 - 2016*



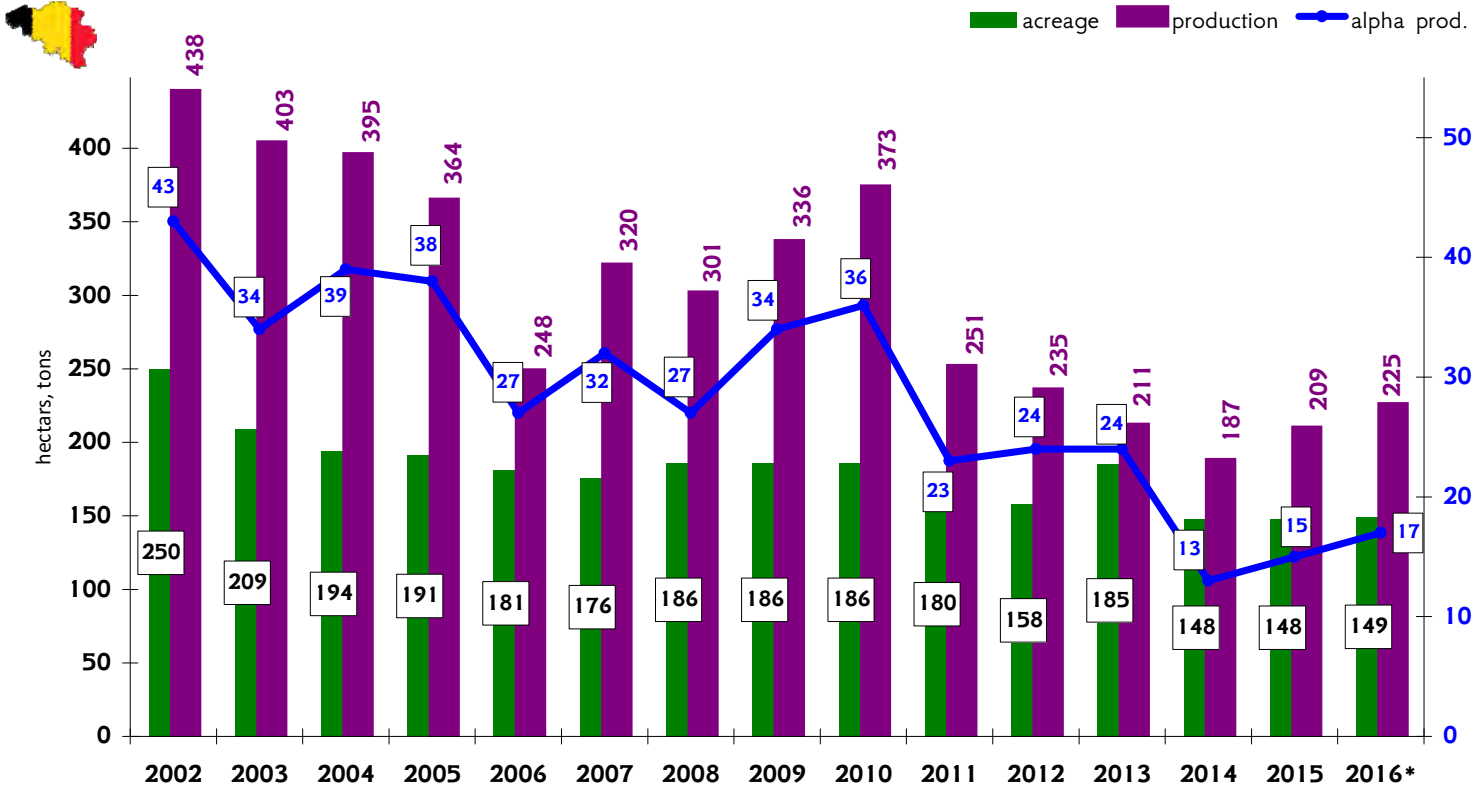
* estimation

Figure 3: Austria hop crop 2002 - 2016*



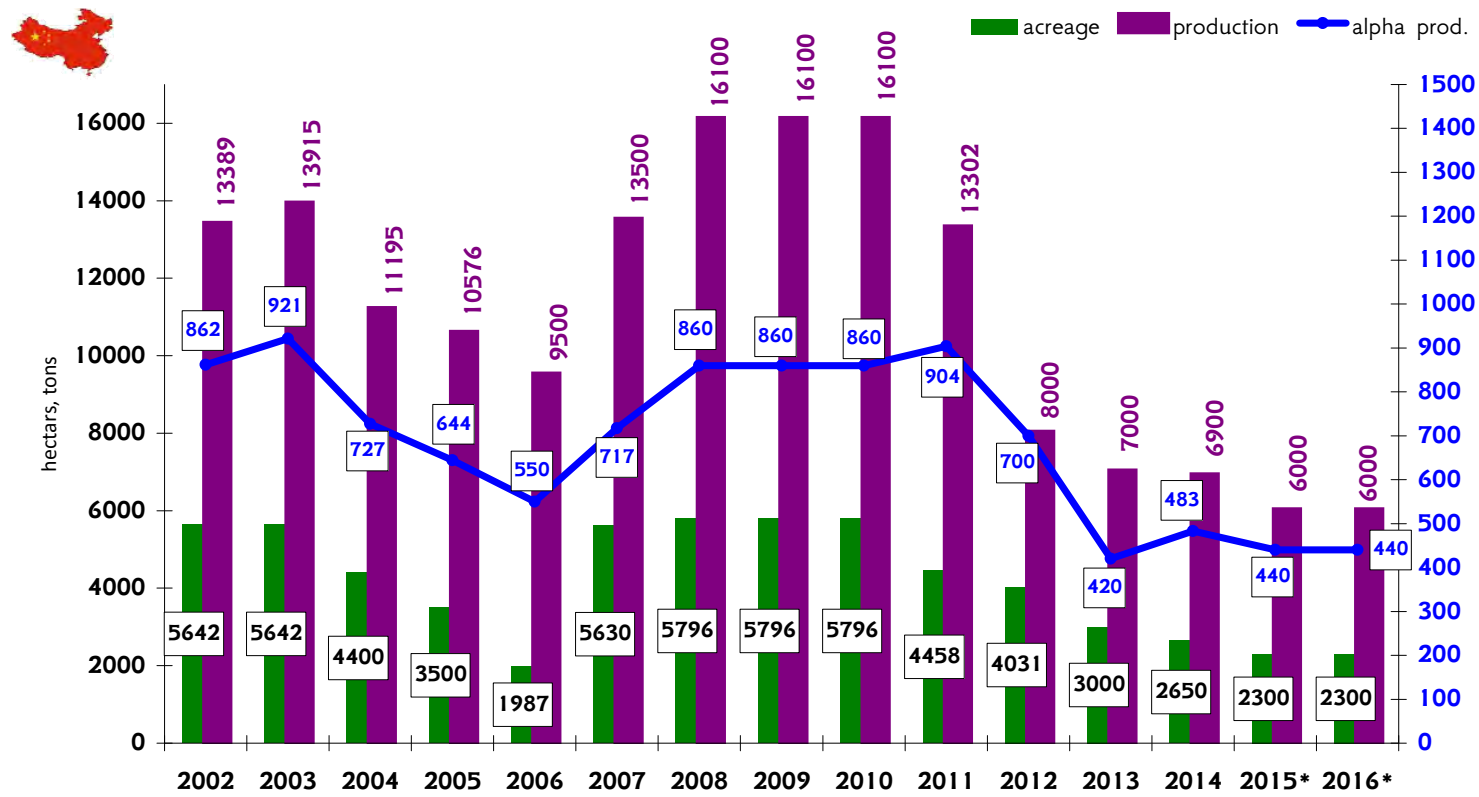
* estimation

Figure 4: Belgium hop crop 2002 - 2016*



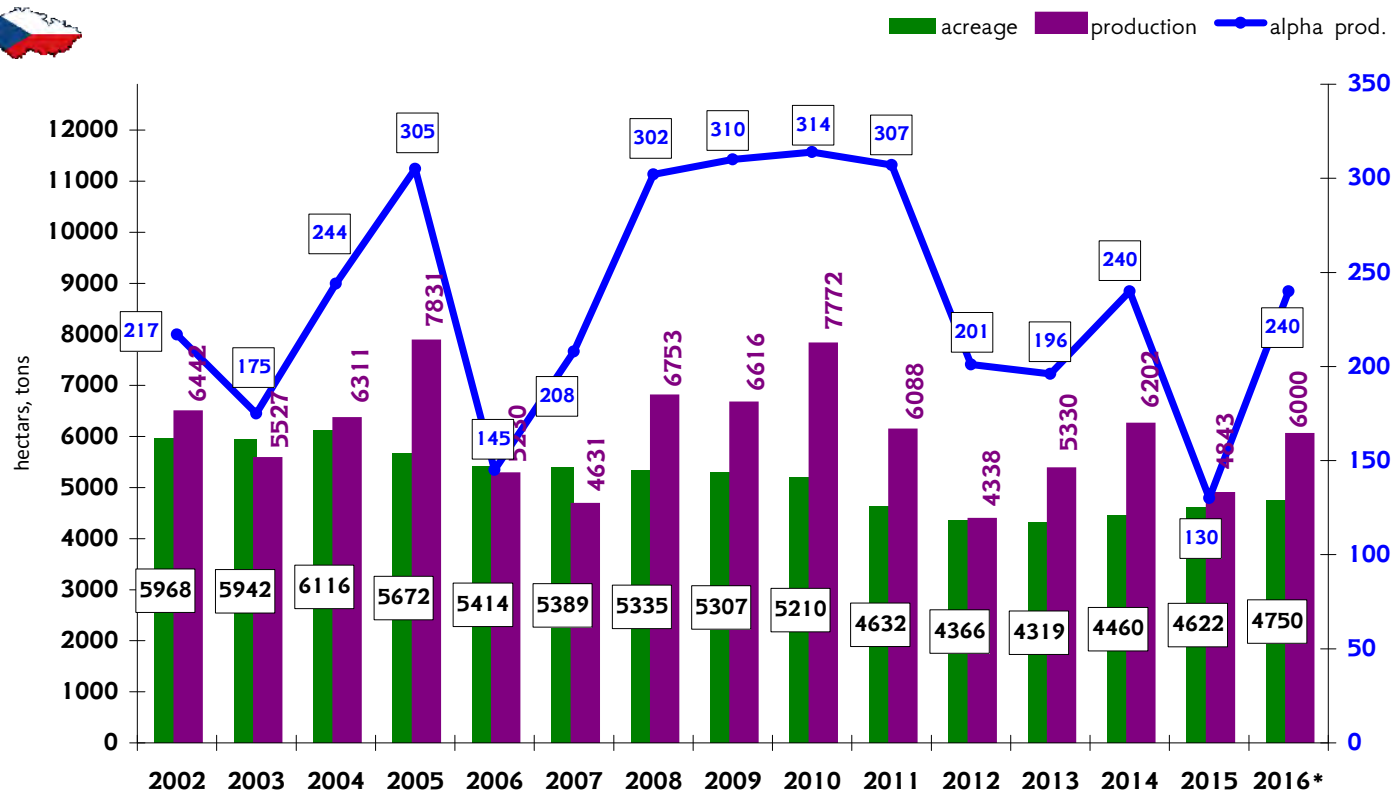
* estimation

Figure 5: China hop crop 2002 - 2016*



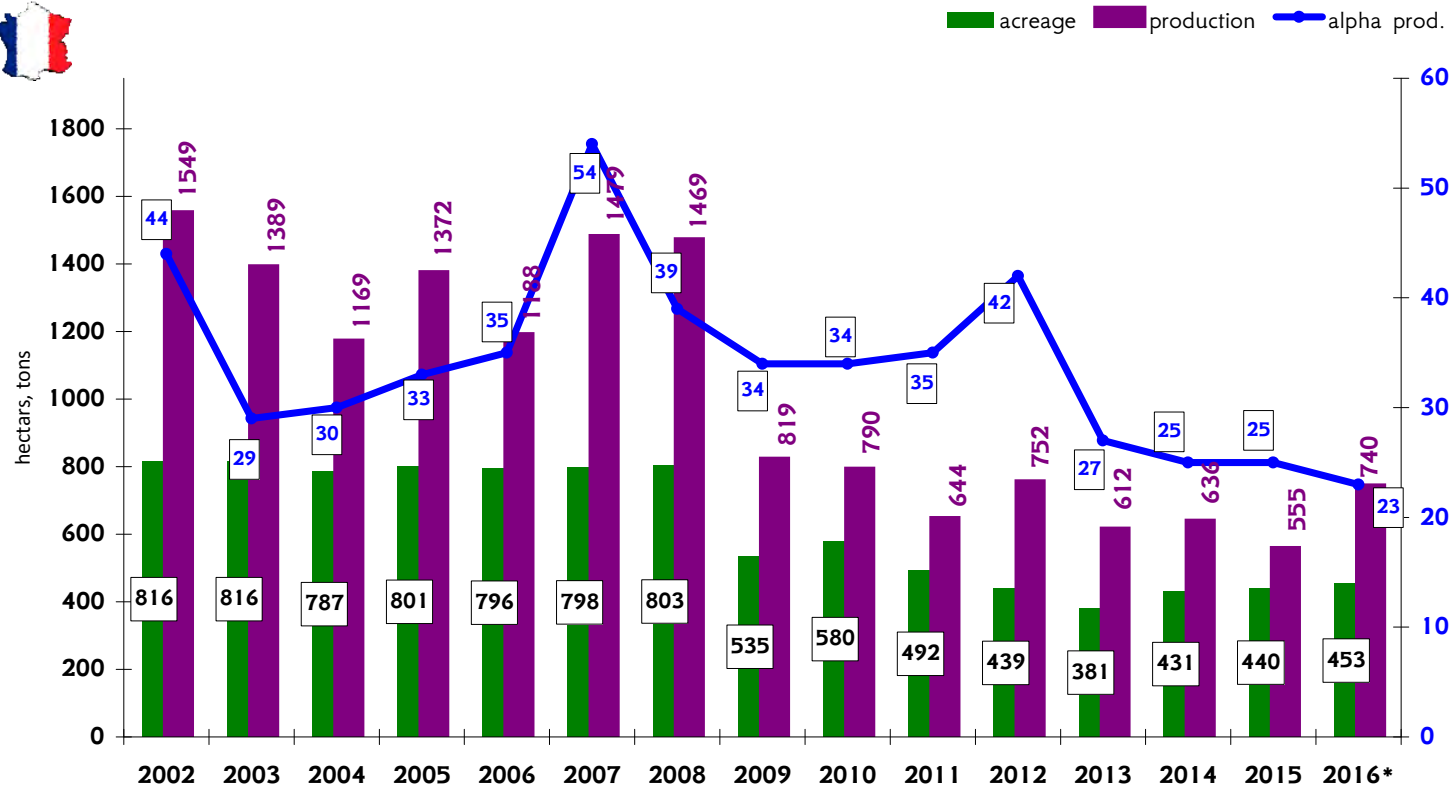
* estimation

Figure 6: Czech Republic hop crop 2002 - 2016*



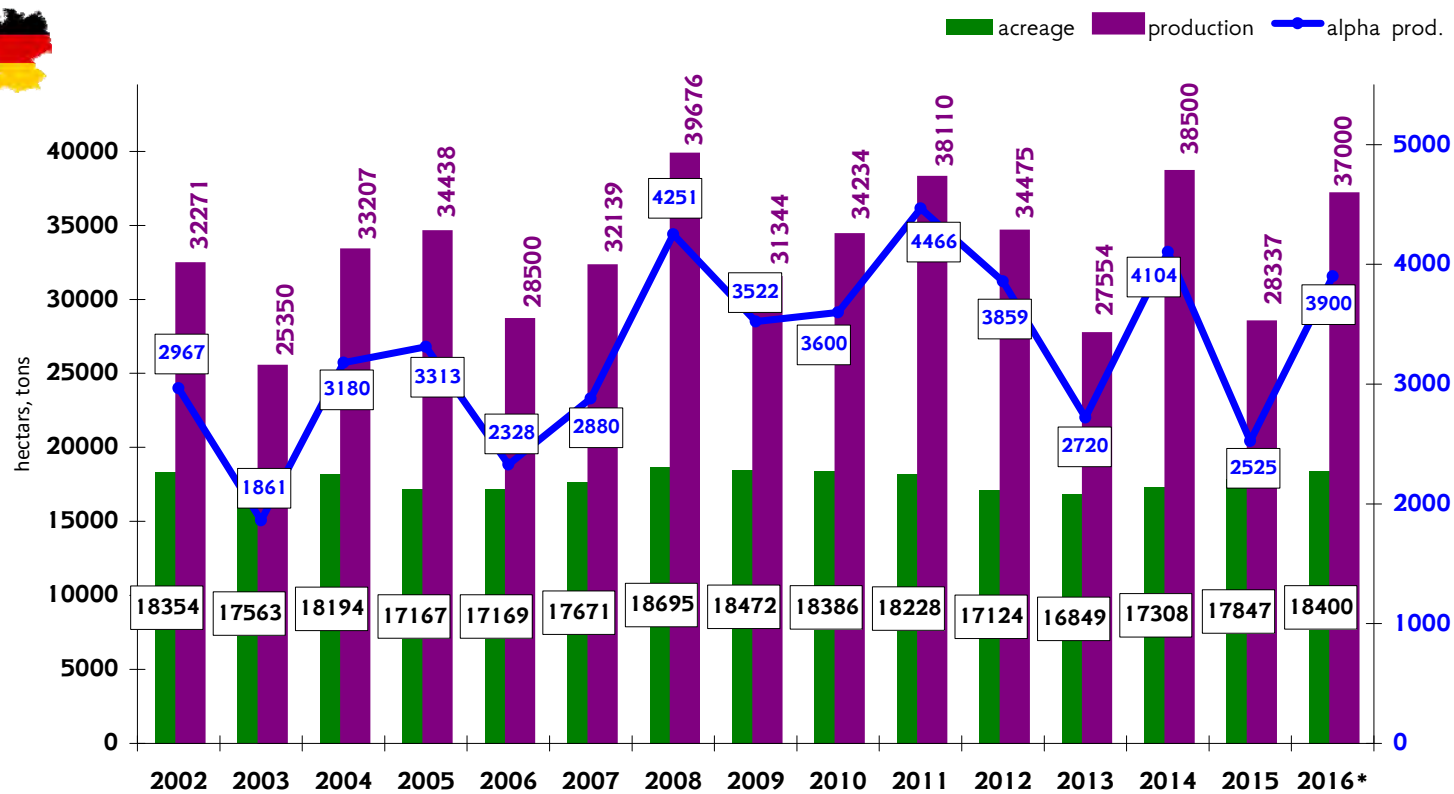
* estimation

Figure 7: France hop crop 2002 - 2016*



* estimation

Figure 8: Germany hop crop 2002 - 2016*



* estimation

Figure 9: New Zealand hop crop 2002 - 2016

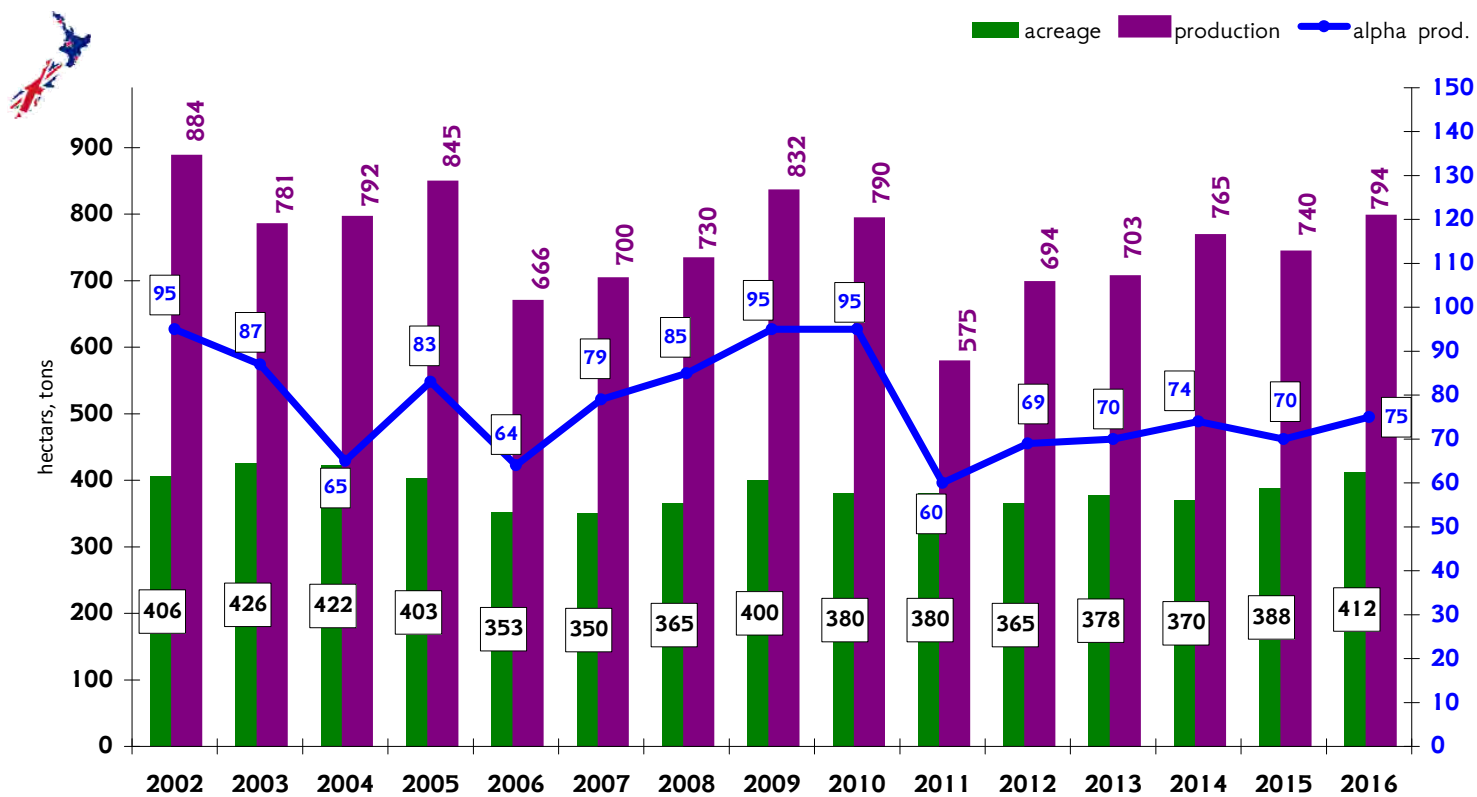
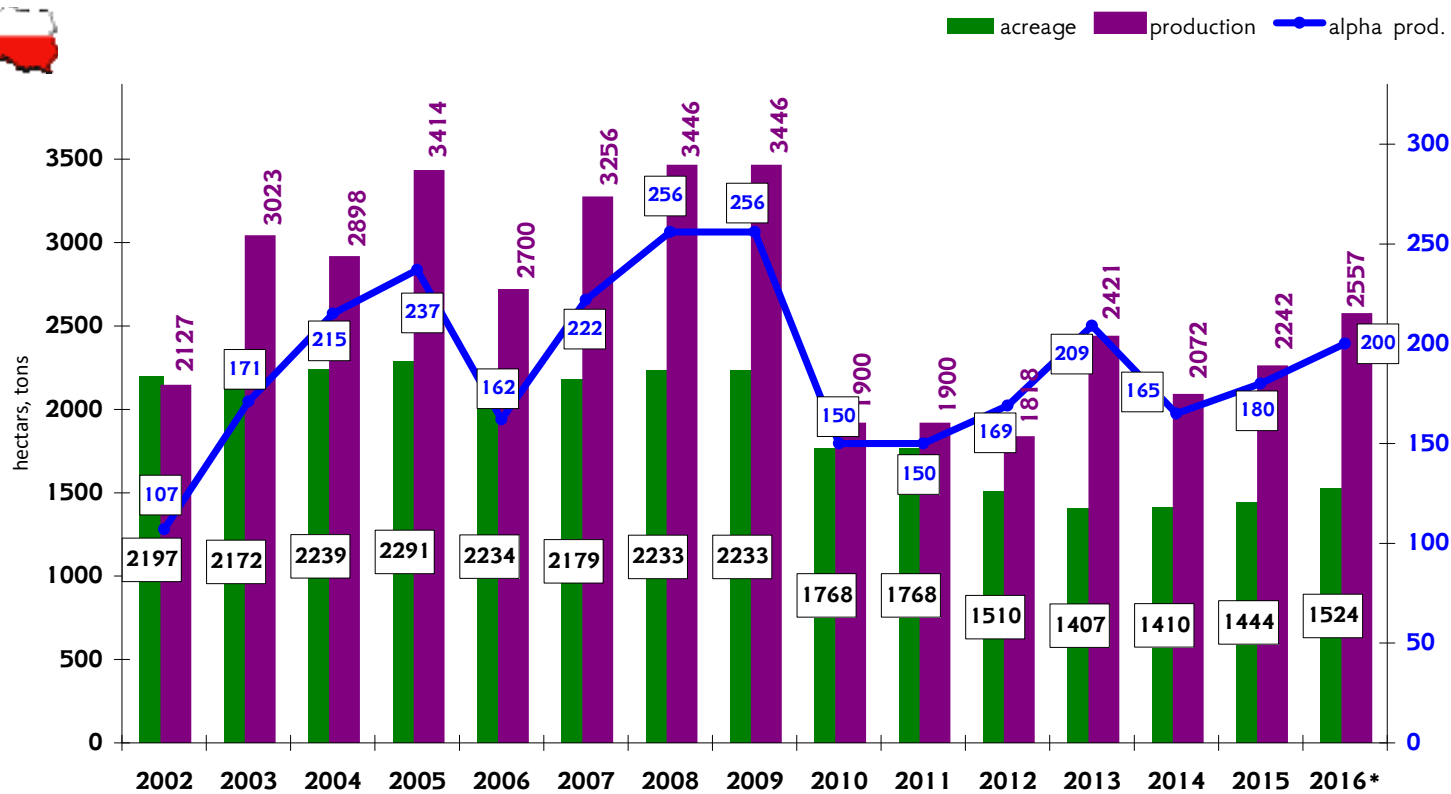
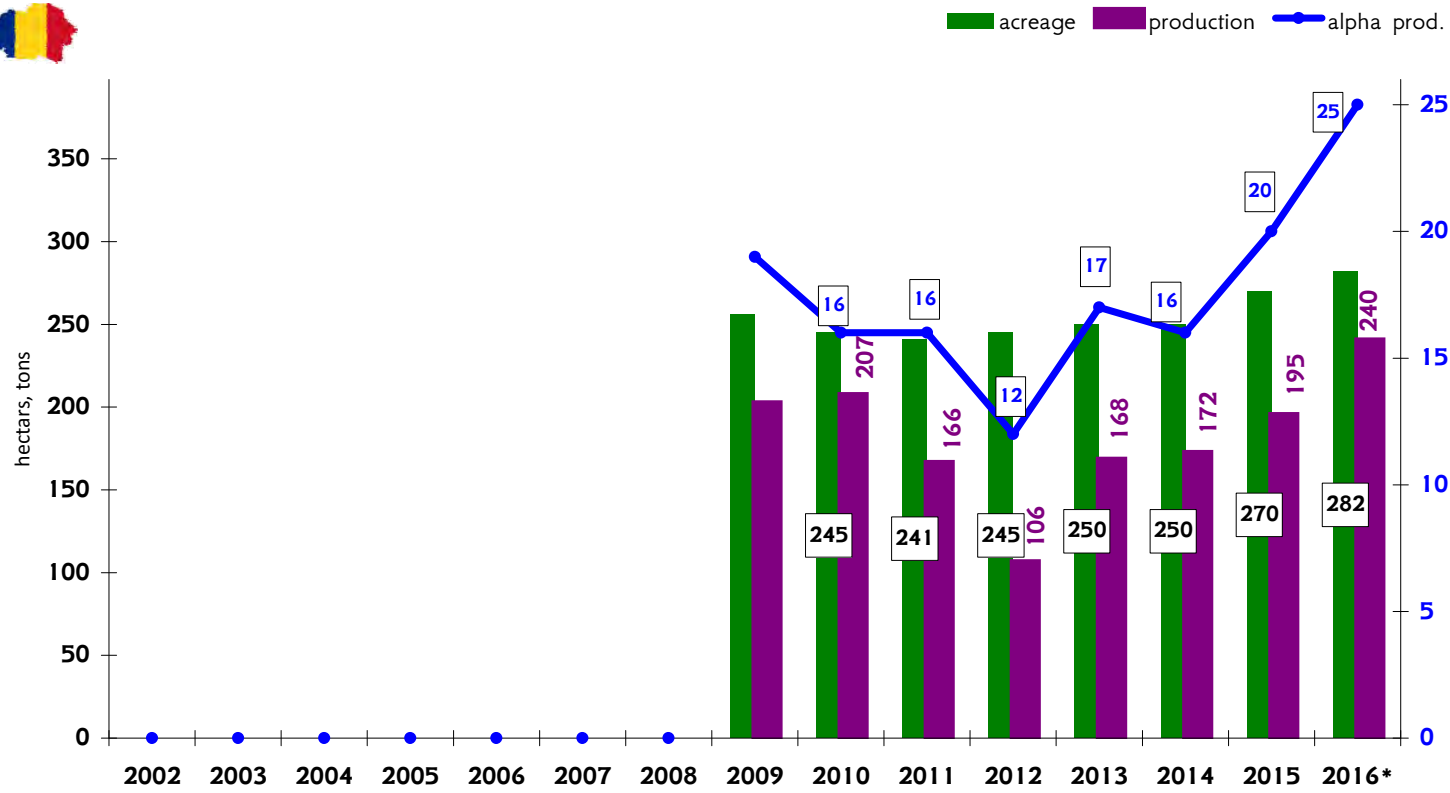


Figure 10: Poland hop crop 2002 - 2016*



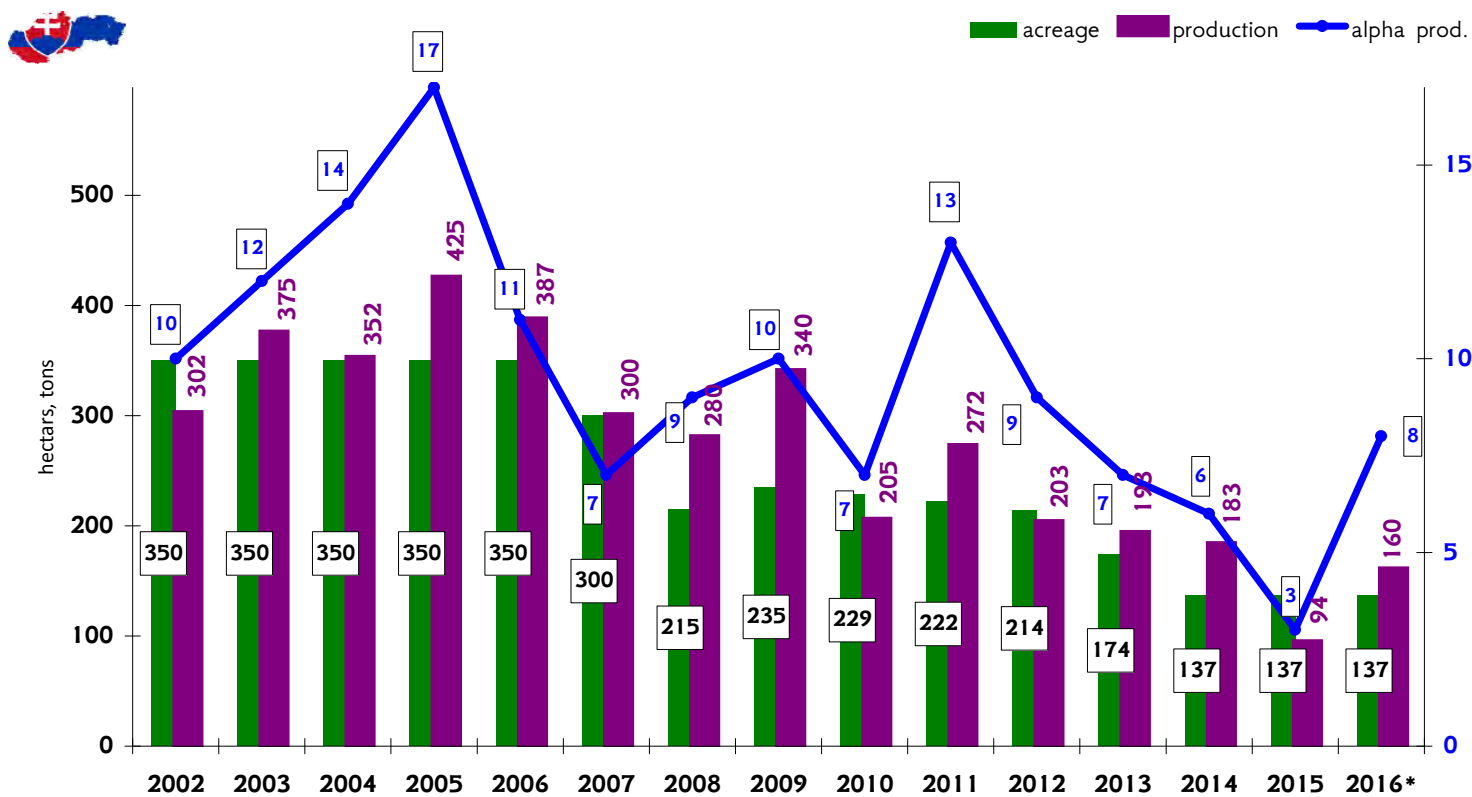
* estimation

Figure 11: Romania hop crop 2002 - 2016*



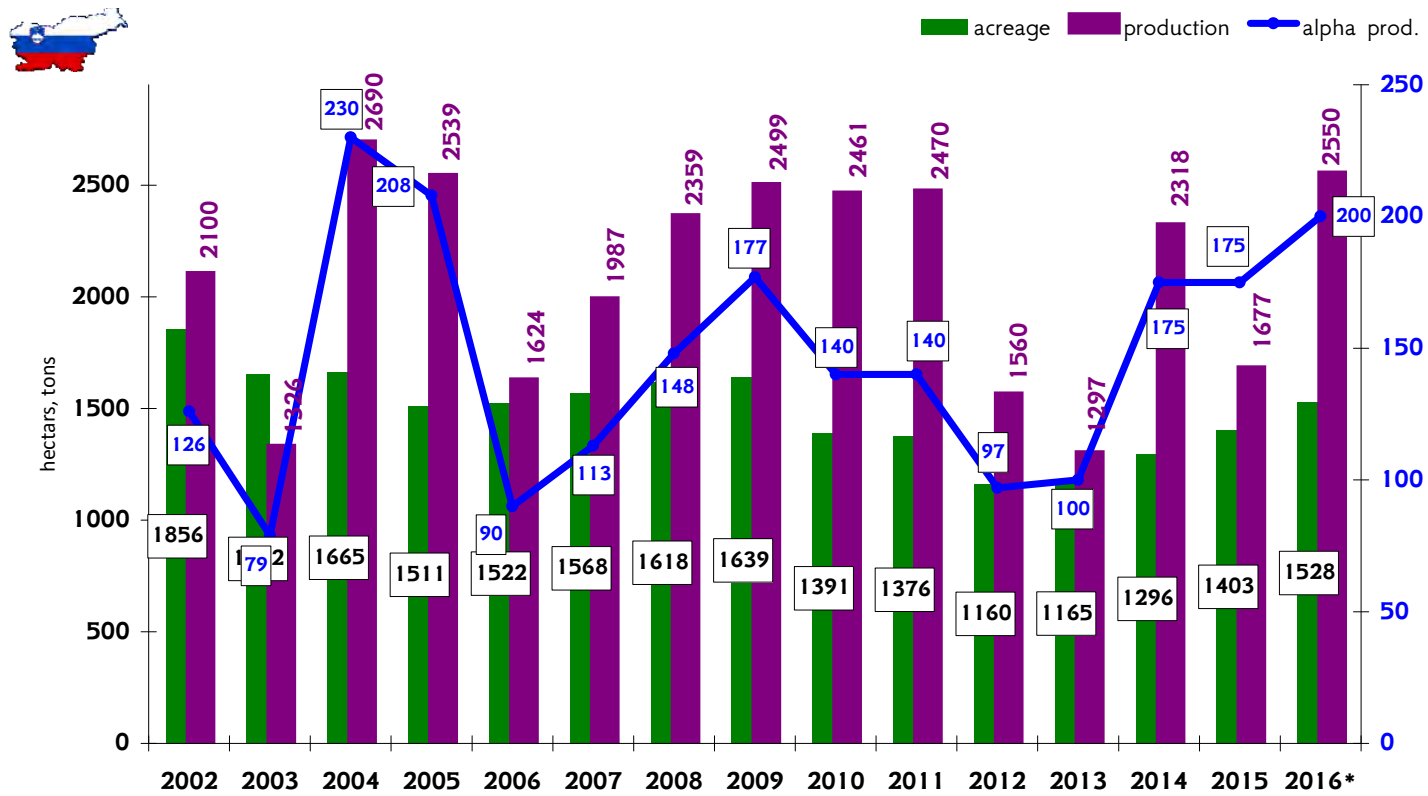
* estimation

Figure 12: Slovakia hop crop 2002 - 2016*



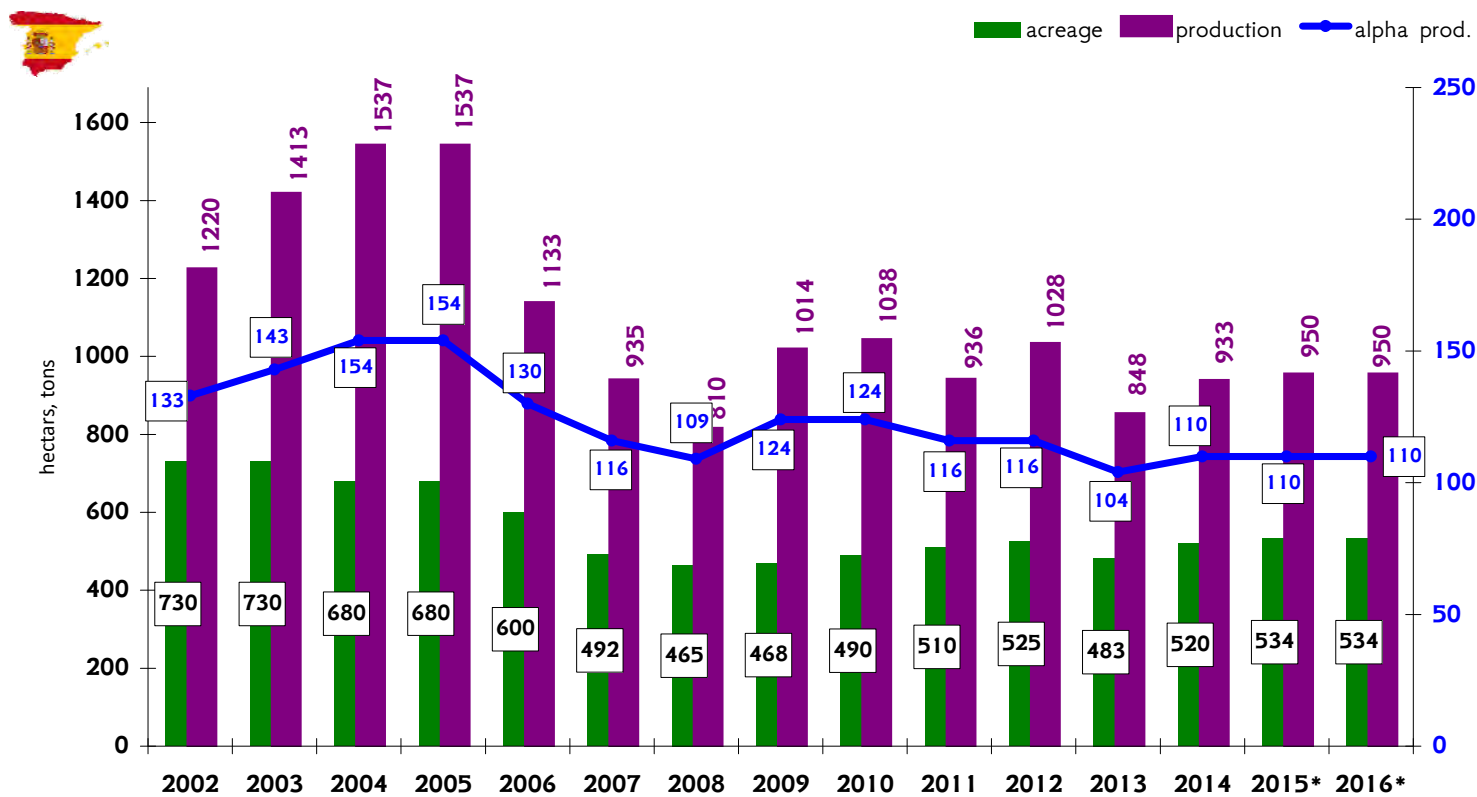
* estimation

Figure 13: Slovenia hop crop 2002 - 2016*



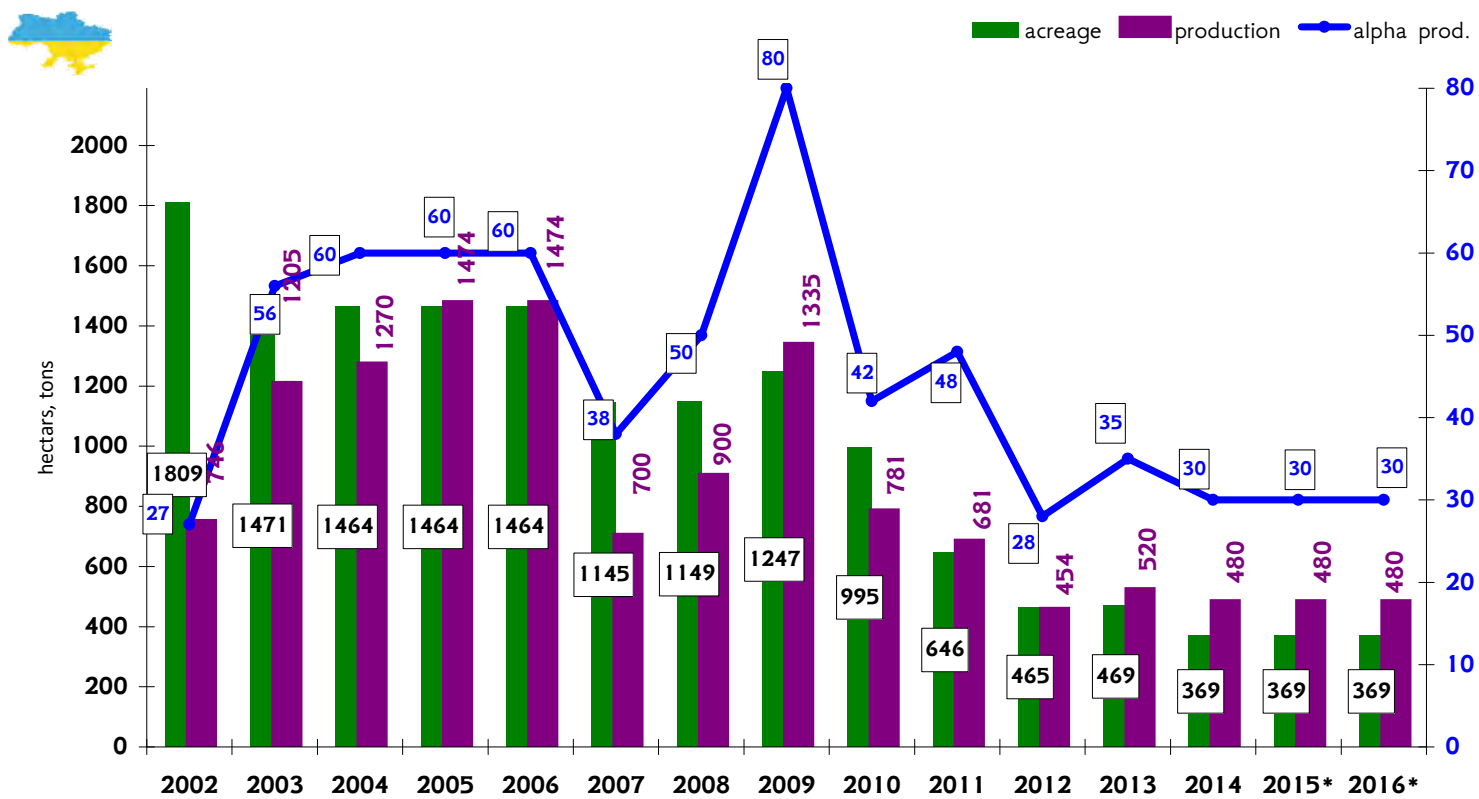
* estimation

Figure 14: Spain hop crop 2002 - 2016*



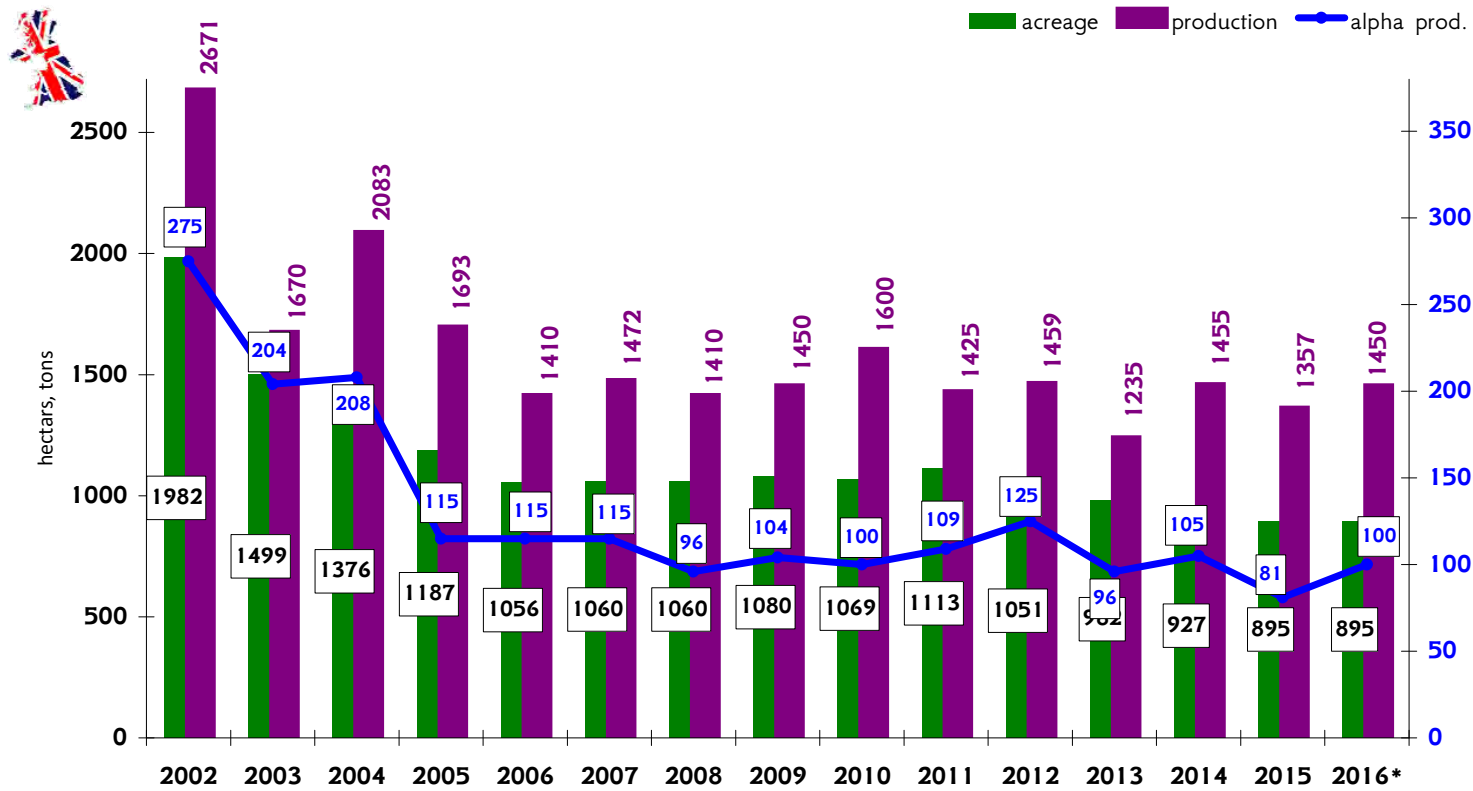
* estimation

Figure 15: Ukraine hop crop 2002 - 2016*



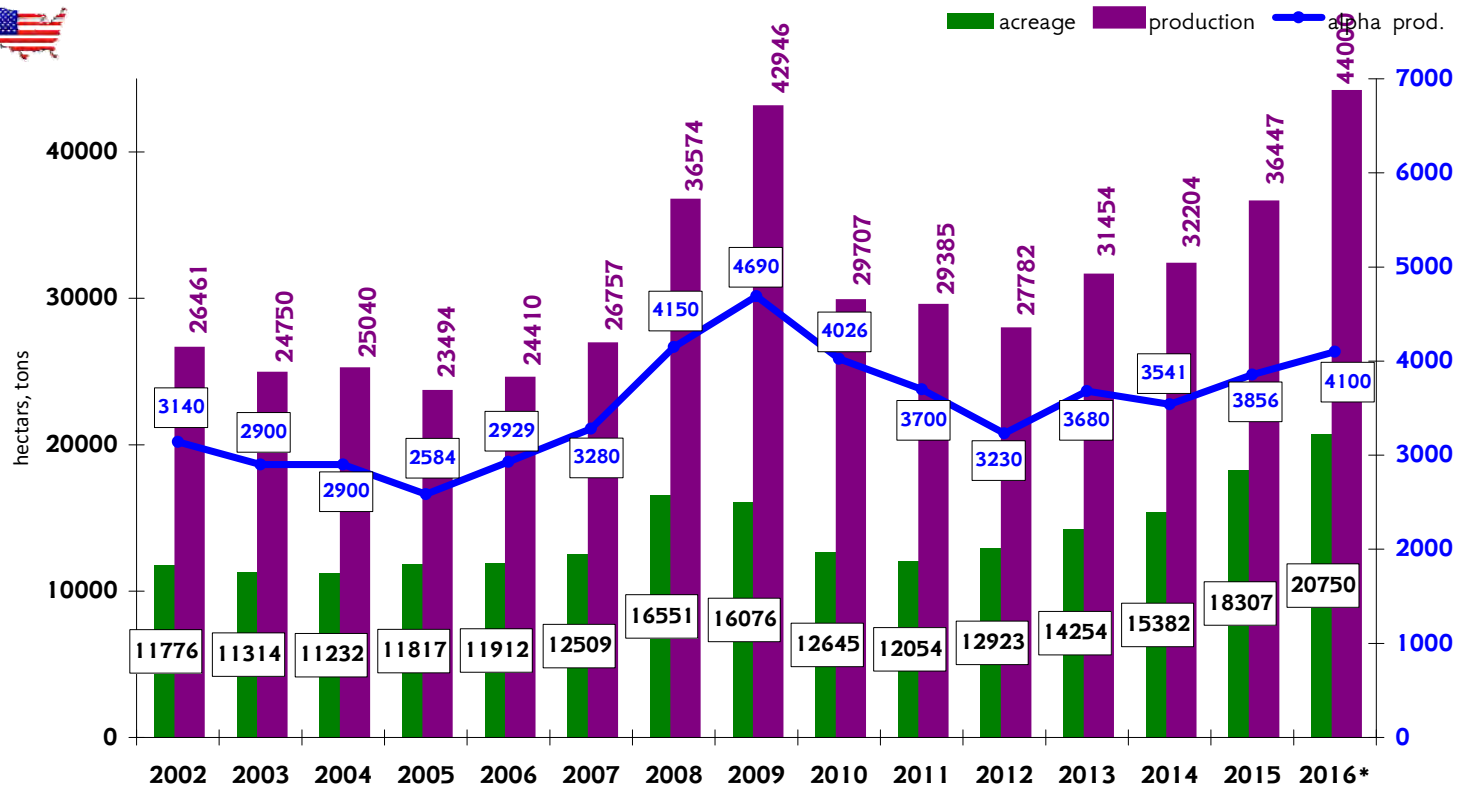
* estimation

Figure 16: UK-England hop crop 2002 - 2016*



* estimation

Figure 17: USA hop crop 2002 - 2016*



* estimation