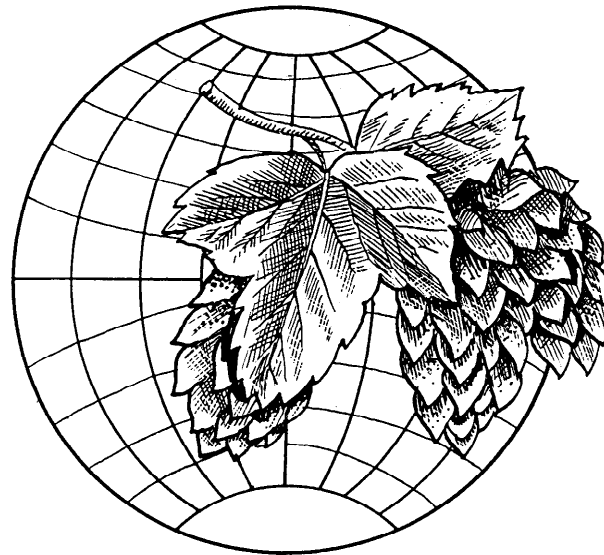


# INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

NUREMBERG, GERMANY

NOVEMBER, 2018



# International Hop Growers' Convention

## IHGC - Economic Commission Summary Reports

Nuremberg, Germany - November, 12, 2018

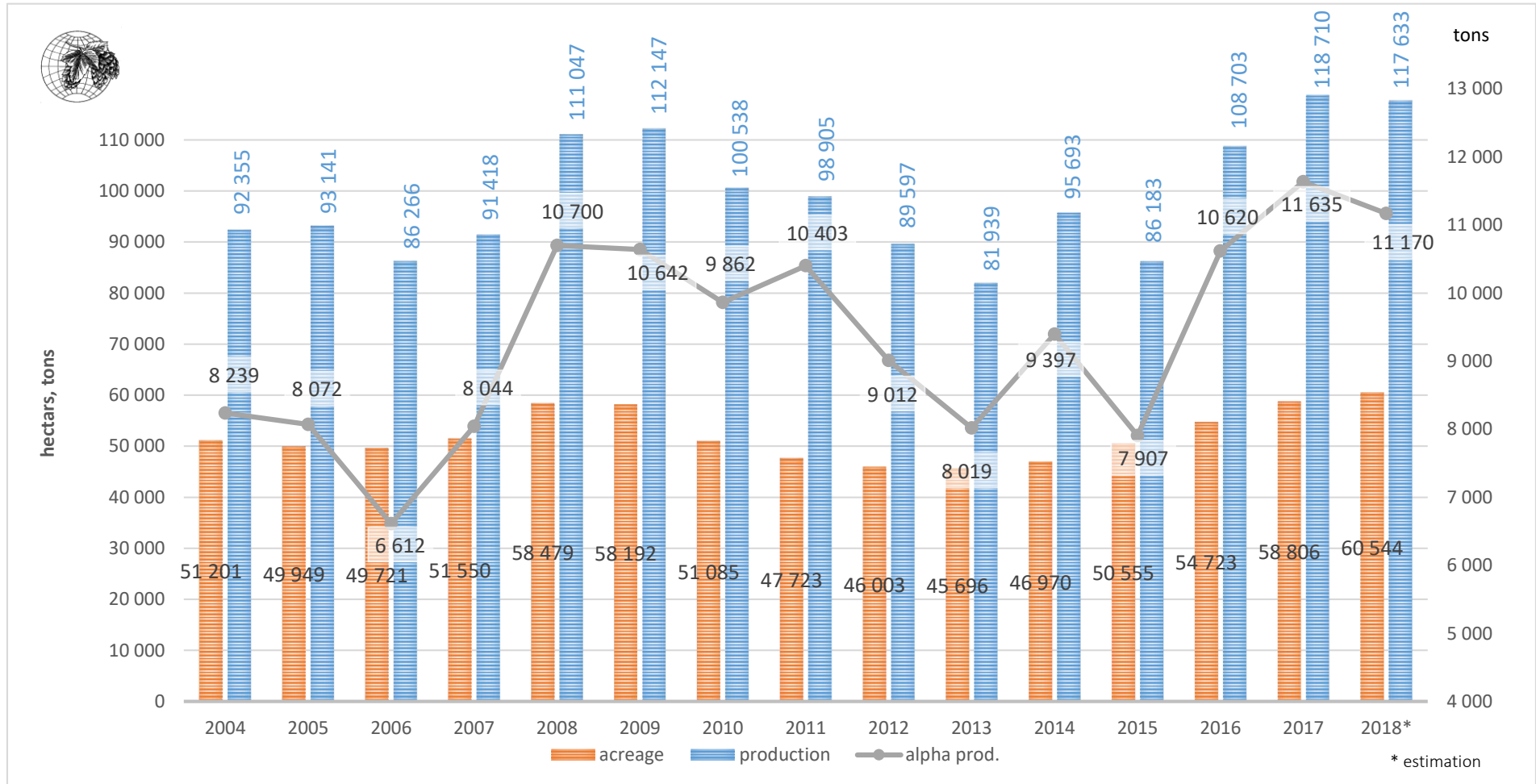
Country	Hop Acreage 2017 (Hectares, Ha)					Hop Production 2017 (in MT = 1.000 kg)			Alpha acid Prod. MT	Hop Acreage 2018 (Hectares, Ha) estimations					Hop Production 2018 (in MT = 1.000 kg) estimations			Alpha acid Prod. MT
	Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total		Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	
Argentina <sup>°</sup>	95	65	160	0	160	145	70	215	22	100	60	160	0	160	180	100	280	25
Australia <sup>°</sup>	446	100	546	85	631	1 200	238	1 438	203	479	152	631	21	652	1 228	354	1 582	225
Austria <sup>°</sup>	186	58	244	6	250	325	114	439	35	190	58	248	4	252	330	115	445	36
Belgium	114	54	169	11	180	138	98	236	16	126	54	180	3	183	133	122	255	14
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	4 583	46	4 629	316	4 945	6 687	110	6 797	270	4 679	45	4 724	296	5 020	5 010	90	5 100	185
France	401	36	437	44	481	676	87	763	25	424	39	463	33	496	775	89	864	36
Germany	10 492	7 574	18 066	1 477	19 543	19 921	21 635	41 556	4 265	10 822	8 465	19 287	857	20 144	20 000	21 700	41 700	3 920
Japan <sup>°</sup>	60	60	120	0	120	130	143	273	30	60	60	120	0	120	130	143	273	30
New Zealand <sup>°</sup>	371	71	442	30	442	620	140	760	72	371	71	442	89	531	600	122	722	65
Poland	622	847	1 468	108	1 576	1 091	1 902	2 993	248	659	918	1 576	0	1 576	830	1 700	2 530	205
Romania	73	192	265	5	270	80	160	240	22	73	197	270	7	277	80	135	215	21
Russia <sup>°</sup>	220	200	420	50	470	250	250	500	40	220	200	420	50	470	250	250	500	40
Serbia <sup>°</sup>	34	33	67	12	79	58	76	134	11	34	33	67	12	79	58	76	134	11
Slovakia	137	0	137	0	137	104	0	104	5	137	0	137	0	137	127	0	127	5
Slovenia	1 393	21	1 414	176	1 590	2 731	36	2 767	150	1 526	21	1 547	120	1 667	3 018	60	3 078	160
South Africa <sup>°</sup>	34	390	424	0	424	46	658	710	85	73	354	427	0	427	77	677	754	75
Spain <sup>°</sup>	0	537	537	0	537	0	662	662	76	0	537	537	6	537	0	960	960	109
Ukraine <sup>°</sup>	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30
UK-England	967	0	967	0	967	1 780	0	1 780	132	966	0	966	0	966	1 377	0	1 377	92
USA	17 767	4 766	22 533	1 100	22 533	33 880	14 310	48 190	5 235	18 257	5 122	23 379	846	23 379	33 292	15 292	48 584	5 223
<b>IHGC</b>	<b>38 923</b>	<b>17 593</b>	<b>56 356</b>	<b>3 420</b>	<b>58 806</b>	<b>71 135</b>	<b>47 569</b>	<b>118 710</b>	<b>11 635</b>	<b>40 124</b>	<b>18 929</b>	<b>59 052</b>	<b>2 344</b>	<b>60 544</b>	<b>68 768</b>	<b>48 865</b>	<b>117 633</b>	<b>11 170</b>

<sup>°</sup> Since no country updates were available, figures from León in 2018 were used.

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

Difference $\Sigma$ 2018-2017	1 201	1 336	2 696	-1 076	1 738	-2 367	1 296	-1 077	-465
Difference $\Sigma$ 2018-2013	15 107	-147	14 959	657	14 850	30 954	4 412	35 366	3 150
Difference $\Sigma$ 2018-2008	13 096	-8 434	4 660	-3 043	6 152	21 288	-16 994	4 294	518

Figure 1: Comparison of IHGC crops 2004 - 2018\* (acreage, production, alpha acids production)





# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

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

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma			4,2	3,0		
Alpha			9,5	11,0		
Total			13,7			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% 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

The extreme drought and the sustained high temperatures had their impact on the alpha values of the hop. Especially in aromatic varieties were the alpha values extremely low. The bitter varieties (especially the variety Target were less subject to these extreme weather conditions.

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2018
O-Hop Area (Ha)	12,78	12,78
O-Production (MT)	16	17

Main O-varieties  
Golding  
WGV

Country, Date: 08.11.2018

Member Organization(s): Joris Cambie



# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

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

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	257,0		175,0		-82,0	-31,9
Alpha	13,0		10,0		-3,0	-23,1
Total	270,0		185,0		-85,0	-31,5

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons						
% Crop / Year N	100	100	97	80	75	60

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% 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

### COMMENTS ON ORGANIC HOPS

	Year N-1 est.	Year N 2018 est.
O-Hop Area (Ha)	10,55	10,55
O-Production (MT)	8,80	6,90

Main O-varieties

Saaz

Premiant

Country, Date:  
01.11.2018

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

# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

**France**

Hop Area (Ha = Hectares)	Year N-1 2017	Year N 2018	Difference N - (N-1)	Difference %
Aroma	401	424	23	105,8%
Alpha	36	39	3	107,8%
Total	437	463	26	106,0%

New Hop Area (Ha)	Year N-1 2017	Year N 2018
Aroma	41	29
Alpha	3	4
Total	44	33

TOTAL Hop Area (Ha)	Year N-1 2017	Year N 2018	Difference N - (N-1)	Difference %
Aroma	442	454	12	102,7%
Alpha	39	42	3	108,8%
Total	481	496	15	103,2%

Production MT=Metric Tons	Year N-1 2017	Year N 2018	Difference N - (N-1)	Difference %
Aroma	676	775	99	114,6%
Alpha	87	89	2	102,3%
Total	763	864	101	113,2%

Yield MT/Ha	Year N-1 2017	Year N 2018	Difference %
Aroma	1,5	1,7	1,1
Alpha	2,2	2,1	0,9
Total	1,6	1,7	1,1

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)
<b>Aroma</b>						
Strisselspalt	181	175,5	-5,5	2,00	1,40	
Aramis	53	58,1	5,1	5,80	5,30	
Tradition	28,3	22,2	-6,1	4,80	4,10	
Triskel	39	47,9	8,9	3,50	2,80	
Fuggle	48,5	54,9	6,4	4,60	2,60	
Golding	45	46,8	1,8	3,50	1,60	
Challenger	6	6	0	6,30	4,70	
Barbe-Rouge	10,6	12,1	1,5	6,00	7,20	
Mistral	7	8,9	1,9	5,50	4,60	
Cascade	4,5	2,7	-1,8		3,50	
<b>Alpha</b>						
Columbus	4,3	5,4	1,1	10,00	9,30	
Brewers Gold	16	15,7	-0,3	5,50	5,20	
Nugget	7,1	9,2	2,1	10,00	9,00	
Magnum	4,7	5,8	1,1	12,00	9,50	
Target	5,7	5,65	-0,05	10,50	9,70	



# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

**France**

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	2018	%		%
Aroma	17,2	3,2	29,5	3,8	12,3	1,7
Alpha	7,8	7,4	6,5	7,3	-1,3	0,8
Total	25,0	3,9	36,0	4,2	11,0	1,4

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons						
% Crop / Year N	90	80	80	60	30	30

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production		676	87	763
- Sold Production		666	87	753
= Unsold Hops		6	0	10
% unsold Hops		0,89	0,00	1,31

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% 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			

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:  
04.11.2018

Member Organization(s):  
AGPH  
Francis Heitz

# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

**Germany**

Hop area ( ha )	Year N-1 2017	Year N 2018	Difference N - (N-1)	Difference %
Aroma	10492	10822	330	3,1
Alpha	7574	8465	891	11,8
Total	18066	19287	1221	6,8

New Hop Area ( ha )	Year N-1 2017	Year N 2018
Aroma	583	346
Alpha	894	511
Total	1477	857

TOTAL Hop area ( ha )	Year N-1 2017	Year N 2018	Difference N - (N-1)	Difference %
Aroma	11075	11168	93	0,8
Alpha	8468	8976	508	6,0
Total	19543	20144	601	3,1

Production MT	Year N-1 2017	Year N 2018 estimate	Difference N - (N-1)	Difference %
Aroma	19 921	20 000	79	0,4
Alpha	21 635	21 700	65	0,3
Total	41 556	41 700	144	0,3

Yield MT/HA.	Year N-1 2017	Year N 2018 estimate	Difference %
Aroma	1,8	1,8	-0,4
Alpha	2,6	2,4	-5,4
Total	2,1	2,1	-2,6

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	2966	3003	37	6,9	5,5	-1,4
Hall.Tradition	2704	2712	8	5,7	5	-0,7
Hersbrucker	915	924	9	2,3	2	-0,3
Hallertauer	723	687	-36	3,5	3,6	0,1
Tettnanger	747	750	3	3,6	3	-0,6
Spalter Select	532	578	46	4,6	3,5	-1,1
Saphir	473	515	42	3	3,3	0,3
Mand. Bavaria	356	321	-35	7,3	7,5	0,2
North. Brewer	300	293	-7	7,8	7,4	-0,4
Amarillo	300	300	0			
Spalter	121	120	-1	3,2	3,5	0,3
Alpha						
Herkules	5797	6309	512	15,5	14,6	-0,9
Hall. Magnum	2011	1992	-19	12,6	11,6	-1
Hall.Taurus	284	258	-26	15,9	13,6	-2,3
Nugget	131	128	-3	10,8	10,1	-0,7
Polaris	174	225	51	19,6	18,4	-1,2

# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

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

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	estimate	%		%
Aroma	1092,0	5,5	900,0	4,5	-192,0	-1,0
Alpha	3173,0	14,7	3020,0	13,9	-153,0	-0,7
Total	4 265	10,3	3920,0	9,4	-345,0	-0,9

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric Tons	42000	38877	37516	27691	25181	18852
% Crop / Year N	101	93	90	66	60	45

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production		19 921	21 635	41 556
- Sold Production		19 921	21 635	41 556
= Unsold Hops		0,00	0,00	0,00
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% Diff. 2017 vs. 2016	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	6,57	9,16		39,40	Farmer Price
Alpha Hops	6,59	10,35		57,10	Farmer Price
Average Price	6,58	9,74		48,00	Farmer Price
<b>Contract Prices</b>					
Aroma Hops	5,36	5,51		2,80	Farmer Price
Alpha Hops	4,39	4,36		-0,70	Farmer Price
Average Price	4,88	4,9		0,40	Farmer Price
<b>Average Prices</b>					
Aroma Hops	5,6	5,9		5,40	Farmer Price
Alpha Hops	4,8	5		4,20	Farmer Price
<b>AVERAGE</b>	5,21	5,4		3,60	Farmer Price

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

### COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2018
	estimate	estimate
O-Hop Area (Ha)	120	140
O-Production (MT)		

Main O-varieties

HAT/PER/SSE

Country, Date:

Verband deutscher Hopfenpflanzler

Germany

31.10.2018

gez. Brunner

# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

Poland

Hop Area (Ha = Hectares)	Year N-1 2017	Year N 2018 (estimate)	Difference N - (N-1)	Difference %
Aroma	622	659	37	5,9
Alpha	847	918	71	8,4
Total	1468	1576	108	7,3

New Hop Area (Ha)	Year N-1 2017	Year N 2018 (estimate)
Aroma	37	?
Alpha	71	?
Total	108	?

TOTAL Hop Area (Ha)	Year N-1 2017	Year N 2018 (estimate)	Difference N - (N-1)	Difference %
Aroma	659	659	0	
Alpha	918	918	0	
Total	1576	1576	0	

Production MT=Metric Tons	Year N-1 2017	Year N 2018 (estimate)	Difference N - (N-1)	Difference %
Aroma	1 091	830	-261	
Alpha	1 902	1 700	-202	
Total	2 993	2 530	-463	

Yield MT/Ha	Year N-1 2017	Year N 2018 (estimate)	Difference %
Aroma	1,8	?	
Alpha	2,3	?	
Total	2,0	?	

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						
Lubelski	419,29					
Lomik	2,76					
Perle	48,78					
Sybilla	98,49					
H. Tradition	70,42					
Puławski	6,72					
Triskel	0,97					
Żatecki	1					
Cascade	9,79					
Centennial	0,2					
Crystal	0,1					
Alpha						
Marynka	273,11					
Magnum	520,18					
Magnat	102,32					
Izabella	0,4					
Iunga	9,67					
Chinook	2,01					
Columbus	0,1					
Rody hodowlane	1,41					
Taurus	7,66					
Oktawia	0,78					

# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

Poland

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	47,6	4,4				
Alpha	200,5	10,5				
Total	248,1	8,3				

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production		1091	1902	2993
- Sold Production		1091	1902	2993
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops		4,48			
Alpha Hops		5,95			
Average Price		5,22			
<b>Contract Prices</b>					
Aroma Hops		4,93			
Alpha Hops		4,84			
Average Price		4,89			
<b>Average Prices</b>					
Aroma Hops		4,71			
Alpha Hops		5,4			
<b>AVERAGE</b>		5,06			

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

We do not have any updated data until now, so I will recommend you to use the latest predictions you have. To be honest, they seem to be right this season.

Overall it looks average by most of growers, there are some who are having better crop, but on the other hand there are also some regions like western part of Poland where the yields are much lower (app. 30-40%). Although, even if the yield was lower, the alpha acids content was not so bad.

**We have catastrophically low alpha content by Lubelski – main polish aroma variety. It varies usually from 1,5 to 2,5 % of alpha!** And this happened actually by all growers in Poland.

The alpha acids content in bitter varieties looks much better and I would say it is average/good year for Hallertauer Magnum and Magnat in Poland. Marynka, Perle and HTR are more less also average.

Even though this season was really hard for all crops, we are very happy for our growers quality so hopefully, I can say this season was good for us.

In our company the purchase goes really well, we are almost done with our quantity. I think all official data will be available after new year from Ministry of Agriculture.

Country, Date:  
Poland, 5.11.2018

Member Organization(s):  
Jan Szalas

# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:  
**Romania**

Hop Area (Ha = Hectares)	Year N-1 2017	Year N 2018 (estimate)	Difference N - (N-1)	Difference %
Aroma	73	73	0	
Alpha	192	197	5	
Total	265	270	5	

New Hop Area (Ha)	Year N-1 2017	Year N 2018 (estimate)
Aroma	0	2
Alpha	5	5
Total	5	7

TOTAL Hop Area (Ha)	Year N-1 2017	Year N 2018 (estimate)	Difference N - (N-1)	Difference %
Aroma	73	75	2	
Alpha	197	202	5	
Total	270	277	7	

Production MT=Metric Tons	Year N-1 2017	Year N 2018 (estimate)	Difference N - (N-1)	Difference %
Aroma	80	80	0	0,0
Alpha	160	135	-25	-15,6
Total	240	215	-25	-15,6

Yield MT/Ha	Year N-1 2017	Year N 2018 (estimate)	Difference %
Aroma	1,10	1,10	0,0
Alpha	0,83	0,69	82,2
Total	0,91	0,80	87,9

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Perle	43	43	0			0
Huller Biterrer	30	30	0			0
Tradition		2	2			2
Alpha						
Magnum	103	108	5			5
Merkur	24	24	0			0
Brewers Gold	70	70	0			0

# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

**Romania**

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	6,2	7,8	6,4	8,0	0,2	0,3
Alpha	15,5	9,7	14,6	10,8	-0,9	1,1
Total	21,7	9,0	21,0	9,8	-0,7	0,7

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons	215	220	240	270	290	300
% Crop / Year N	100	100	100	100	100	100

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production		80	160	240
- Sold Production		80	160	240
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% 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

Extremely low rainfall in April , May and to 16 iunie  
Very high temperature in May over 30 C

Country, Date:  
ROMANIA

Member Organization(s):  
MORA ACATIU ERVIN





# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country: <b>Slovakia</b>
-----------------------------

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	5,0		4,8			
Alpha						
Total	5,0		4,8			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% 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

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2018
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:  
07.11.2018

Member Organization(s):  
Slovchmel, Marian Mensik



# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

**Slovenia**

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	150,0	5,4	160,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons						
% Crop / Year N	85	80	75	70	60	N.A.

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production		2 731	36	2 767
- Sold Production		2 731	36	2 767
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price	7.5				
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>	5.2	6.6			
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

There was sufficient rainfall amount for a hop production in 2018.

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2018
O-Hop Area (Ha)	0	0
O-Production (MT)	0	0

Main O-varieties

-

Country, Date:  
Slovenia, November 5, 2018

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



# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

**UK**

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	132,0	7,4	92,0	6,7	40,0	-10%
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production		1 780		1 780
- Sold Production		1 780		1 780
= Unsold Hops		0		0
% unsold Hops		0%		0%

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% 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

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2018
O-Hop Area (Ha)	2,00	2,00
O-Production (MT)	1,40	1,23

Main O-varieties  
Organic First Gold

Country, Date: 03.11.2018

Member Organization(s):  
The British Hop Association

# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

**USA**

Hop Area (Ha = Hectares)	Year N-1 2017	Year N 2018 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 767	18 257	490	2,8%
Alpha	4 766	5 122	356	7,5%
Total	22 533	23 379	846	3,8%

New Hop Area (Ha)	Year N-1 2017	Year N 2018 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2017	Year N 2018 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 767	18 257	490	2,8%
Alpha	4 766	5 122	356	7,5%
Total	22 533	23 379	846	3,8%

Production MT=Metric Tons	Year N-1 2017	Year N 2018 (estimate)	Difference N - (N-1)	Difference %
Aroma	33 880	33 292	-588	-1,7%
Alpha	14 310	15 292	982	6,9%
Total	48 190	48 584	394	0,8%

Yield MT/Ha	Year N-1 2017	Year N 2018 (estimate)	Difference %	Pounds/Acre
Aroma	1,91	1,82	-4,37%	1 627
Alpha	3,00	2,99	-0,57%	2 664
Total	2,14	2,08	-2,83%	1 854

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 - Pacific Northwest Only</b>				9,2%	8,8%	
Amarillo®, VGXP01	1 201	1 106				
Azacca™, ADHA-483	234	221				
Cascade	2 813	2 432				
Centennial	2 132	1 968				
Chinook	921	1 149				
Citra®, HBC 394	2 072	2 692				
Cluster	251	247				
Ekuanot™, HBC 366	360	352				
Mosaic® HBC 369	1 098	1 120				
Palisade®, YCR 4	231	209				
Simcoe®, YCR 14	1 865	1 585				
<b>Total Aroma</b>	<b>13 178</b>	<b>13 081</b>				
<b>Alpha - Pacific Northwest Only</b>				14,8%	15,0%	
Apollo™	369	415				
Bravo™	257	150				
CTZ	1 976	2 469				
Eureka!™	147	220				
Hallertauer Magnum	19	42				
Nugget	604	601				
Pahto® HBC 682		671				
Summit™	654	652				
Super Galena™	203	274				
<b>Total Alpha</b>	<b>4 229</b>	<b>5 494</b>				
Other Varieties	4 115	3 819				
<b>Total Pacific Northwest</b>	<b>21 522</b>	<b>22 394</b>				

# International Hop Growers' Convention

IHGC-Economic Committee: November 2018 - Nuremberg, Germany

Country:

**USA**

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	3 117	9,2	2 930	8,8		
Alpha	2 118	14,8	2 294	15,0		
Total	5 235	11,1	5 223	10,7		

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons						
% Crop / Year N	98	95	65	40	30	25

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% 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	US\$5.72/lb	US\$5.92/lb			
<b>AVERAGE</b>	11.09 Euro/kg	11.49 Euro/kg			

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate \$1 USD = 0.88 Euro (3 Nov 2018). Alpha and aroma classifications are based on the IHGC list of varieties. Other Varieties include those not listed for the Pacific Northwest, plus all acreage outside of the Pacific Northwest. Other acreage is estimated to include 90% aroma and 10% alpha 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.

## COMMENTS ON ORGANIC HOPS

	Year N-1	Year N 2018
O-Hop Area (Ha)		142
O-Production (MT)		152

Main O-varieties

Country, Date: USA

XI.18

Member Organization(s):  
Hop Growers of America

Figure 2: Belgium hop crops 2004 - 2018\*

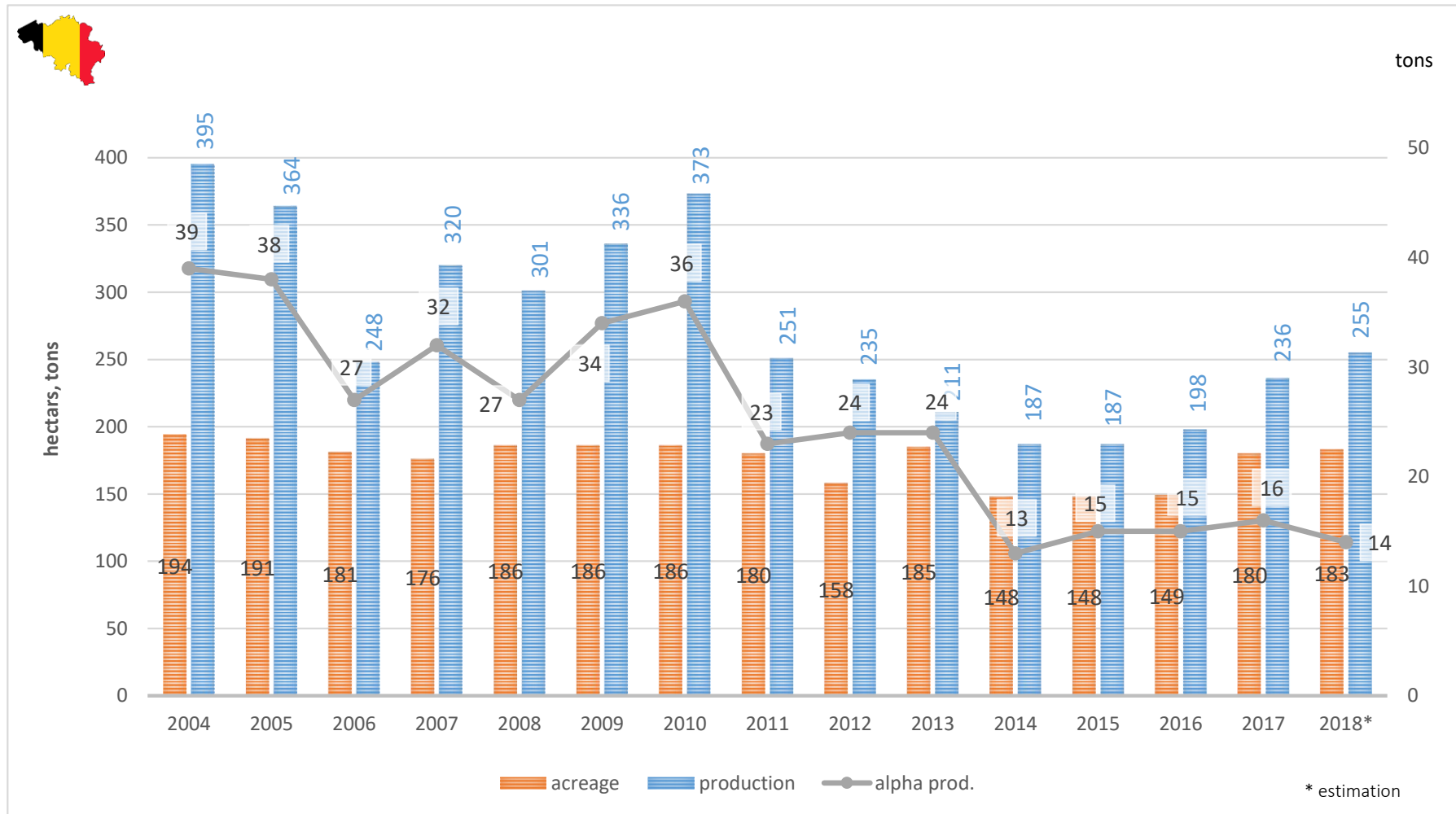




Figure 3: Czech Republic hop crops 2004 - 2018\*

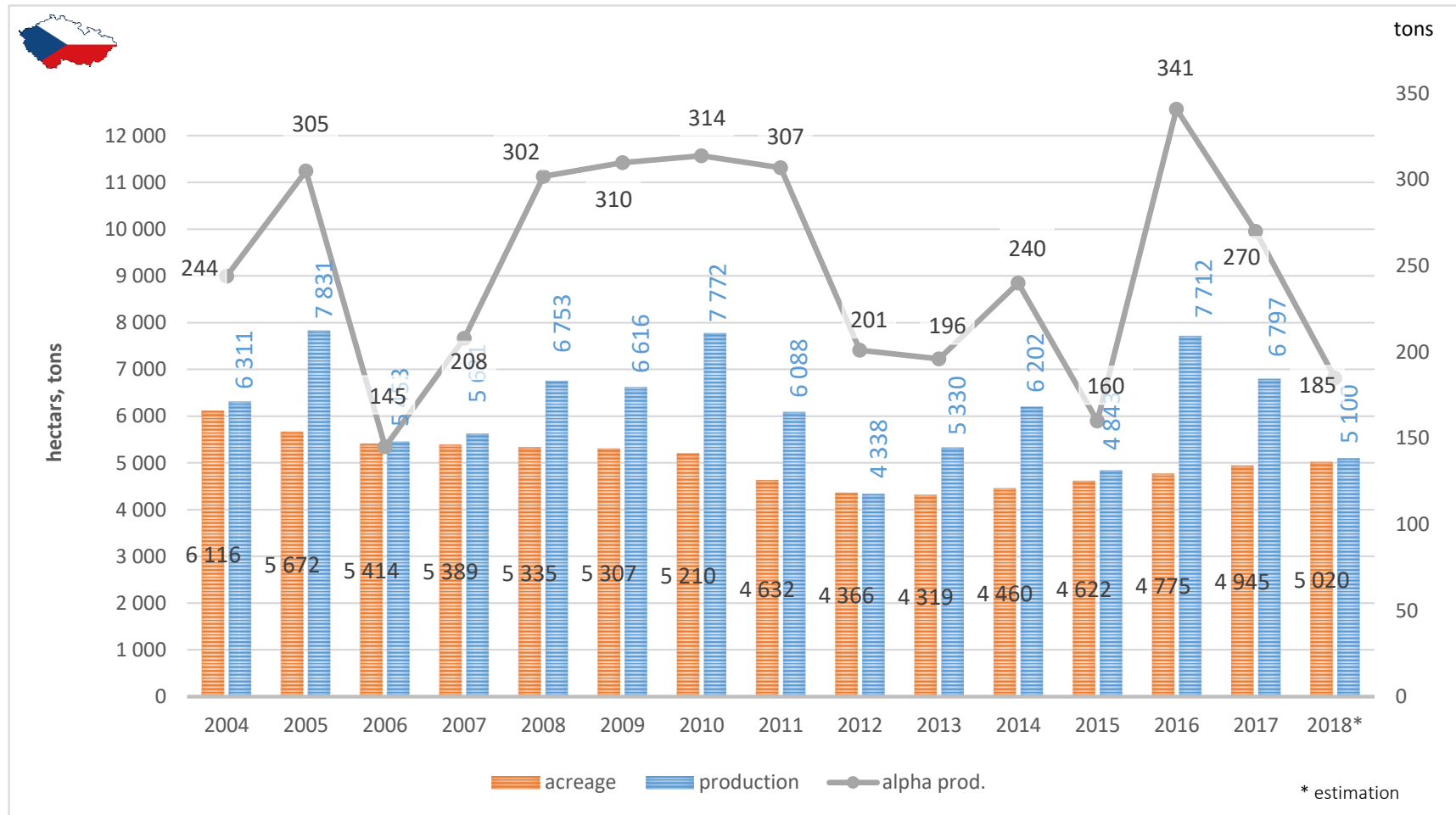


Figure 4: France hop crops 2004 - 2018\*

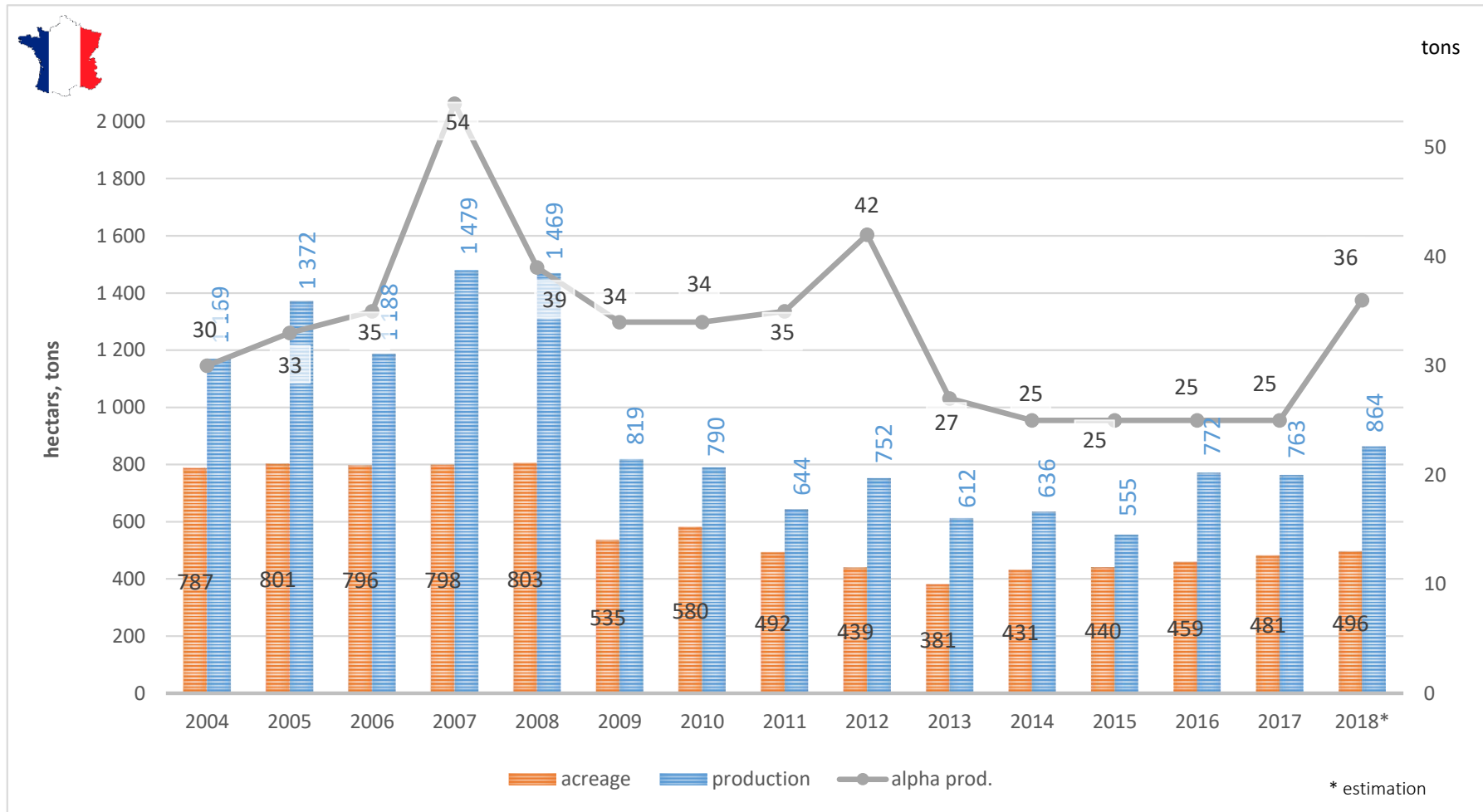


Figure 5: Germany hop crops 2004 - 2018\*

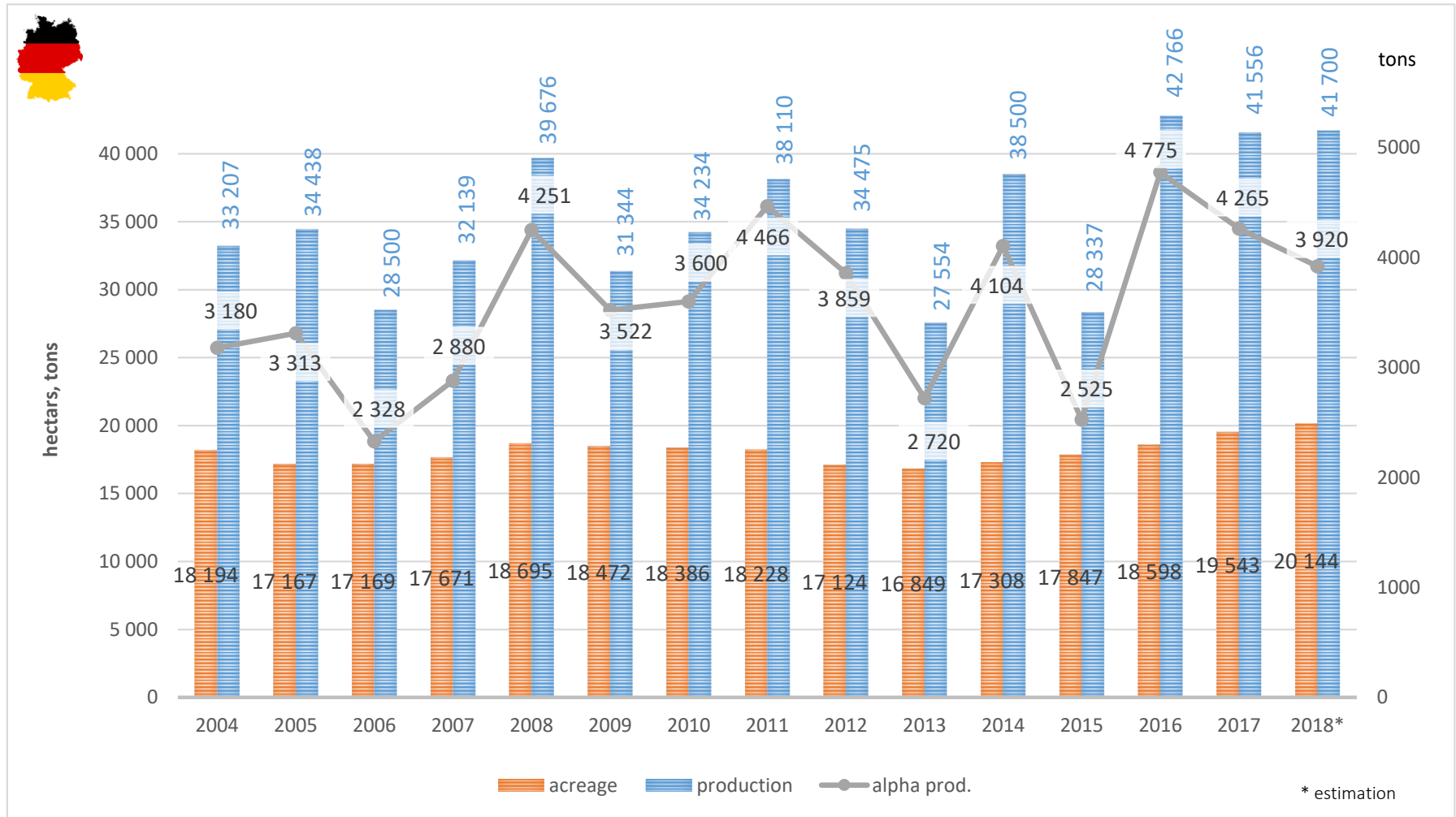


Figure 6: Poland hop crops 2004 - 2018\*

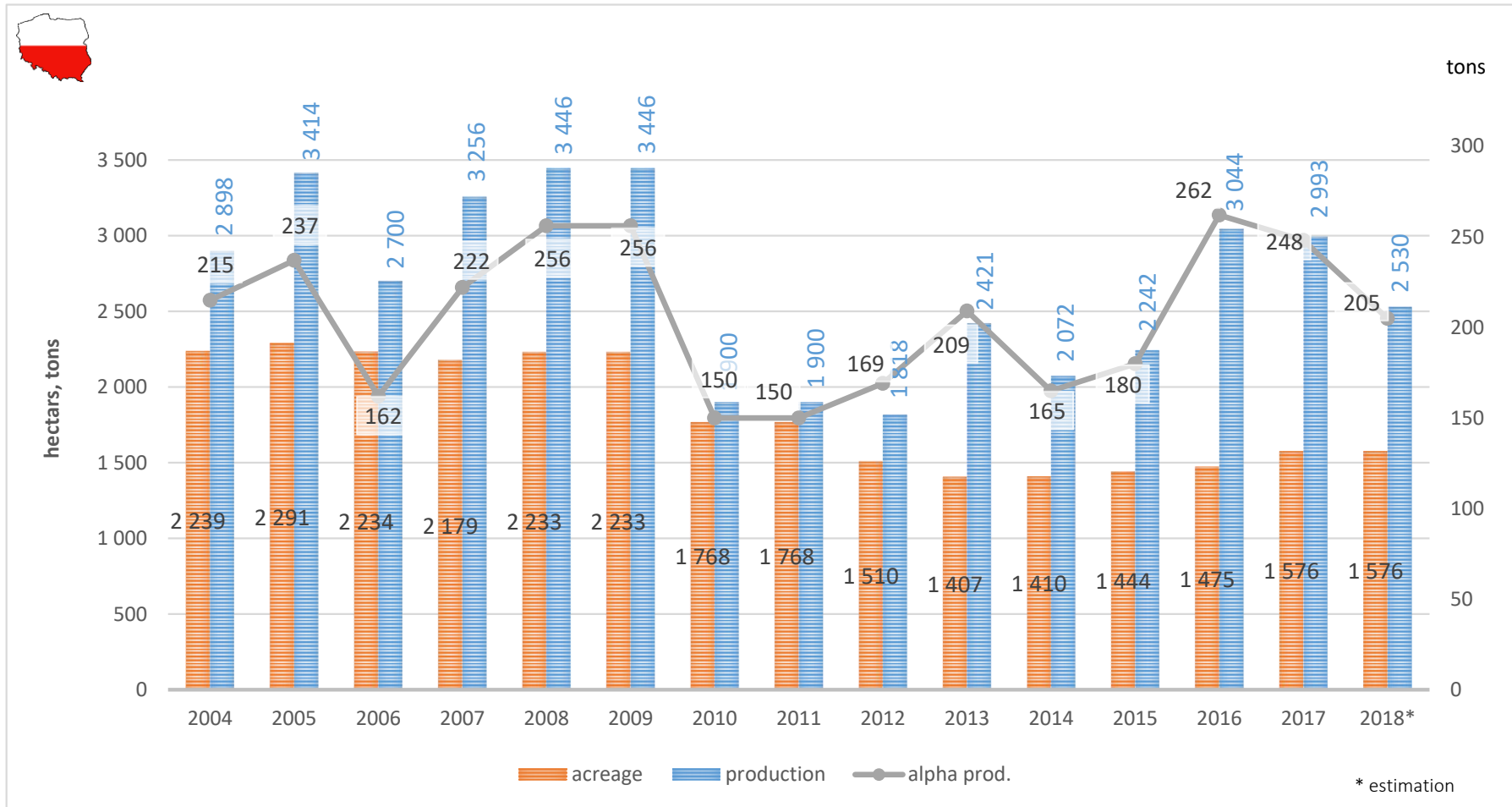


Figure 7: Romania hop crops 2004 - 2018\*

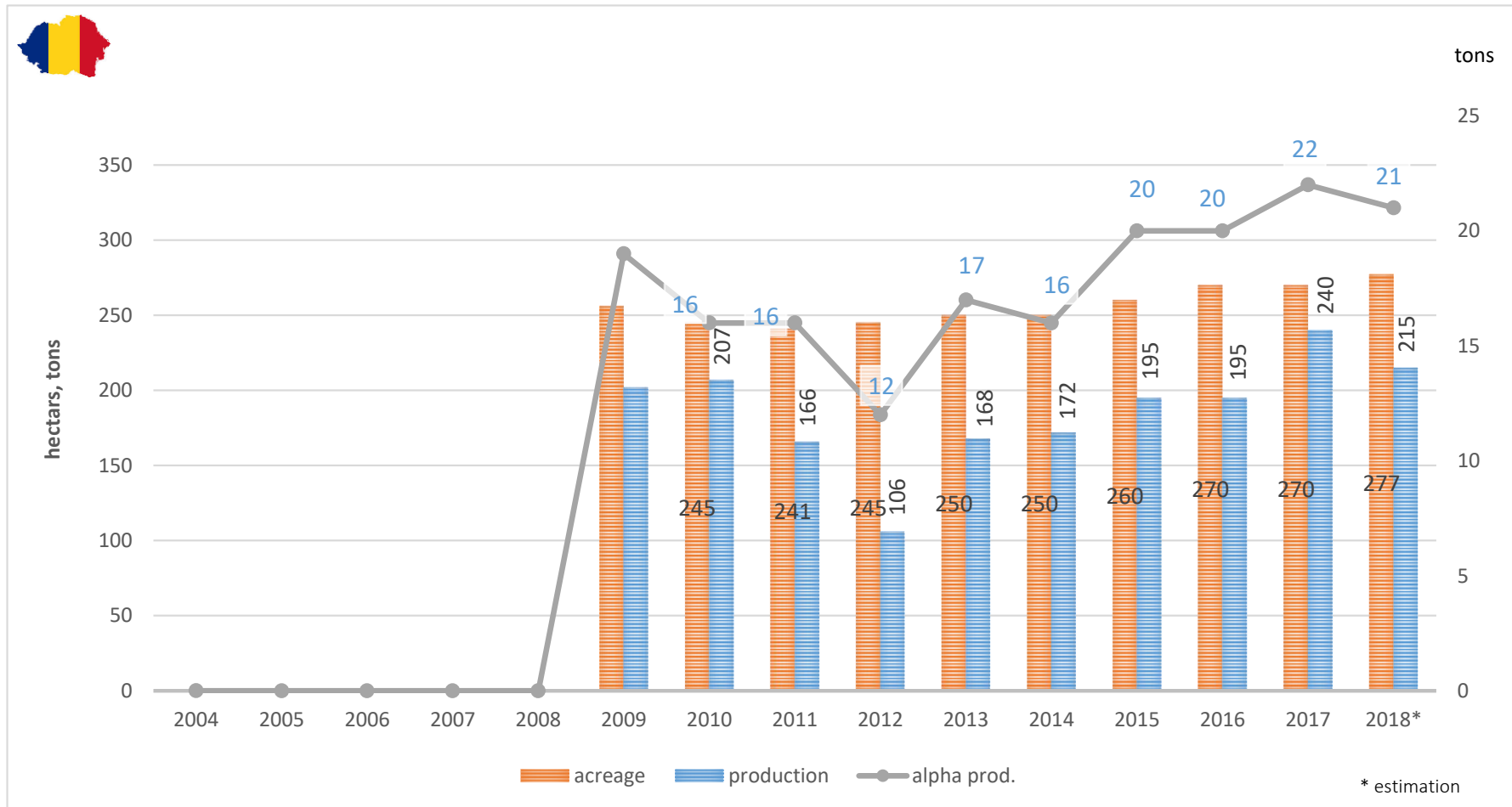


Figure 8: Slovakia hop crops 2004 - 2018\*

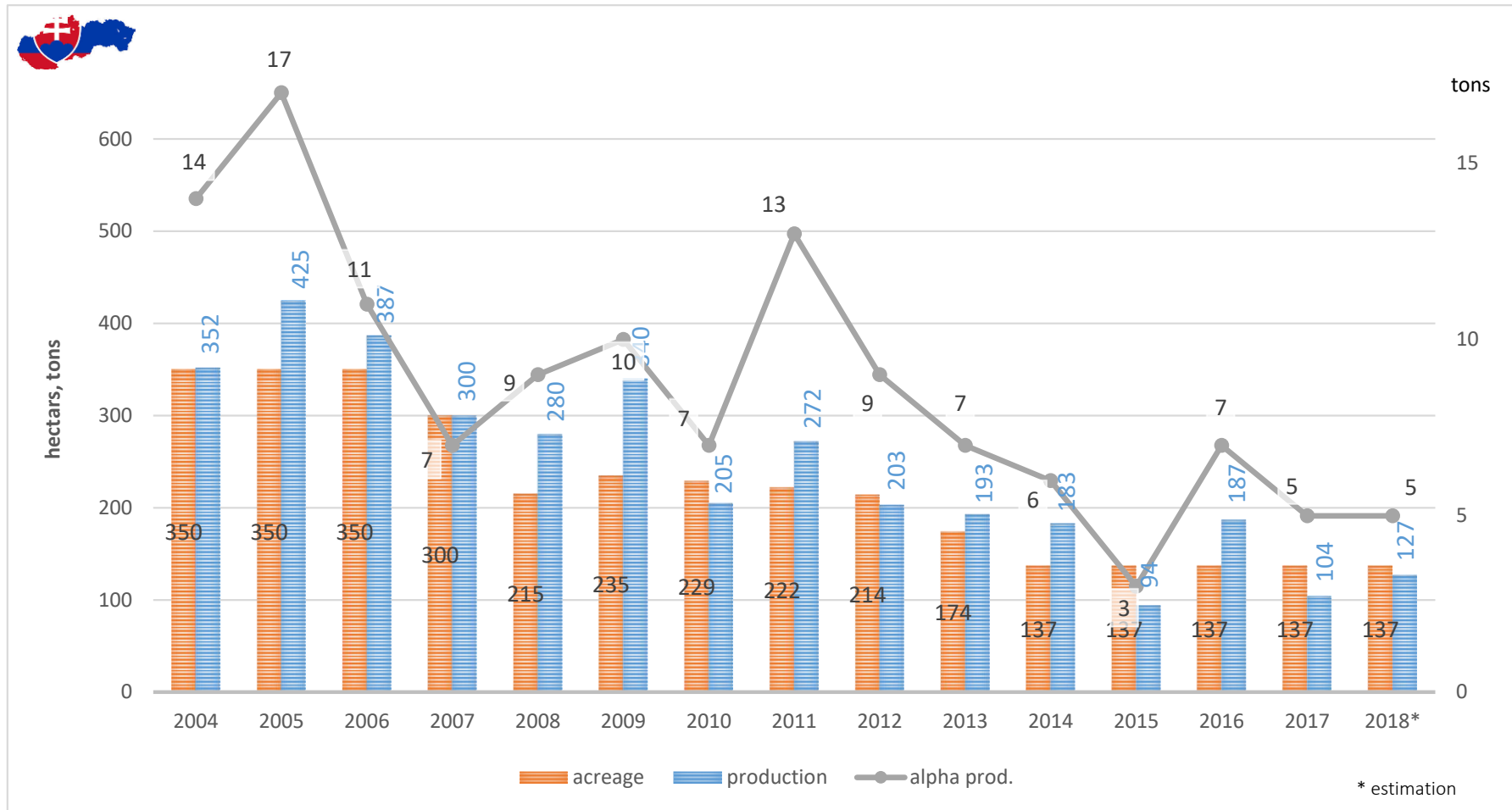


Figure 9: Slovenia hop crops 2004 - 2018\*

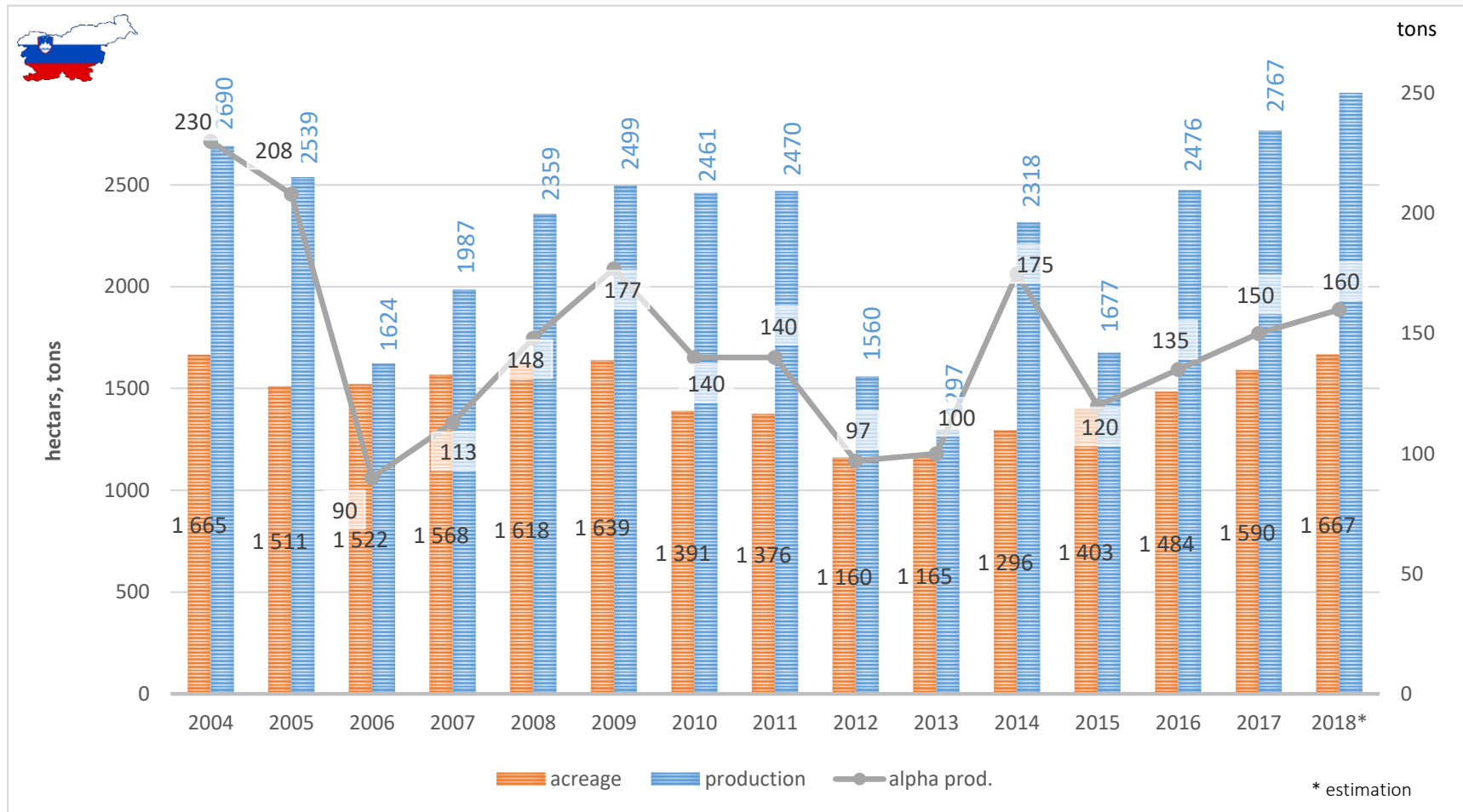




Figure 10: UK-England hop crops 2004 - 2018\*

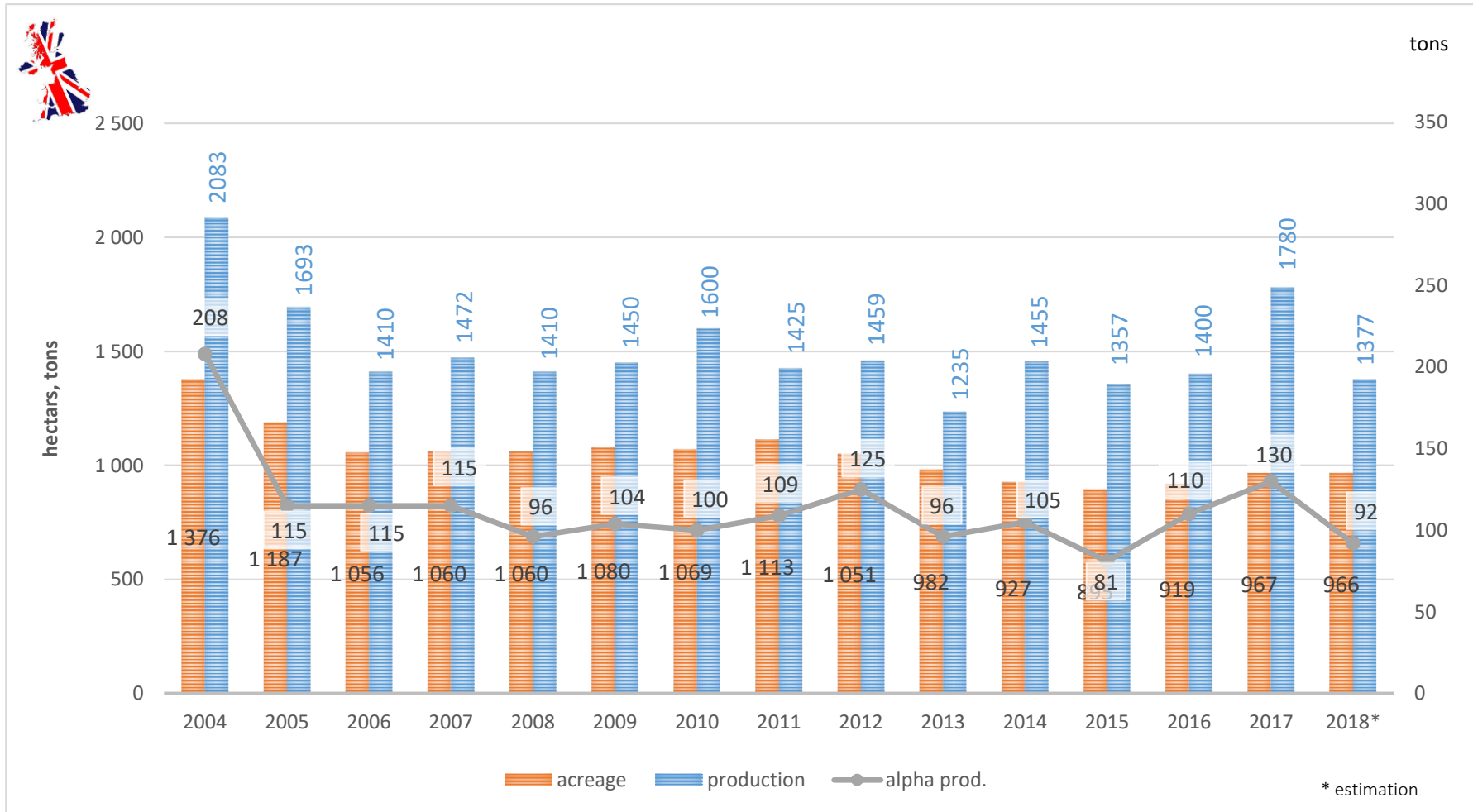




Figure 11: USA hop crops 2004 - 2018\*

