

HOP GROWERS of America



2000 STATISTICAL REPORT

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Statistical Overview

	1990	2000	Change 90/2000	% Change 90/2000
HOP PRODUCTION (million lbs.)				
United States	56.8	67.5	10.7	19%
Germany	66.7	62.7	-4	-6%
World	251.5	211.4	-40.1	-16%
IHGC AROMA ACREAGE				
United States	15,061	10,807	-4,254	-28%
Germany	32,325	25,612	-6,713	-21%
World	94,592	70,754	-23,838	-25%
IHGC ALPHA ACREAGE				
United States	20,945	25,597	4,652	22%
Germany	17,333	17,995	662	4%
World	59,483	67,914	8,431	14%
IHGC TOTAL HOP ACREAGE				
United States	35,463	36,404	941	3%
Germany	55,345	45,915	-9430	-17%
World	224,188	143,616	-80572	-36%
U.S. CROP QUALITY (weighted average)				
Leaf & Stem Content	1.09	0.12	-0.97	-89%
Seed Content	0.74	1.18	0.44	59%
ALPHA ACID PRODUCTION (1,000 lbs.)				
United States	4,958	7,238	2,280	45%
Germany	3,232	5,557	2,325	71%
World	15,236	16,253	1,017	6.6%
ALPHA ACID CONSUMPTION				
WORLD	17,432	17,214	-218	-1%
BEER PRODUCTION (millions barrels)				
United States	238.9	237.0	-1.9	-0.7%
World	1,141.7	1,374.3	232.6	+20%
U.S. HOP EXPORTS (1,000 LBS.)				
Japan	287	1,288	1,001	348%
Belgium	1,601	3,096	1,495	93%
Germany	5,619	4,734	-885	-15%
Total	42,878	40,830	-2048	-5%
U.S. HOP IMPORTS (1,000 LBS.)				
Germany	11,573	7,442	-4131	-36%
France	560	1,774	1214	217%
United Kingdom	2	837	835	41,750%
Total Imports	17,243	11,614	-5629	-33%

U.S. HOP PRODUCTION BY STATE AND VARIETY 1996 – 2000

STATE & VARIETY	HOP PRODUCTION (Pounds)					% +/-
	1996	1997	1998	1999	2000	
IDAHO						
Banner	130,900	138,400	-	-	-	-
Chinook	571,500	612,000	507,600	383,900	340,000	-11%
Cluster	1,639,800	1,566,900	886,300	694,600	384,700	-45%
Galena	1,072,800	1,050,000	895,700	1,049,300	971,000	-7%
Horizon	-	-	-	7,000	-	-
Mt. Hood	32,200	17,500	15,000	22,900	106,000	363%
Nugget	27,300	72,300	131,900	152,500	136,000	-11%
Willamette	139,800	150,400	160,700	333,000	297,600	-11%
Zeus	-	-	2,000	397,100	824,500	108%
Other Varieties	1,981,700	1,876,600	1,932,200	1,693,700	1,870,000	10%
Total Idaho	5,596,000	5,484,100	4,531,400	4,734,000	4,929,800	4%
OREGON						
Fuggle	687,800	391,300	206,600	105,400	67,100	-36%
Golding	-	230,300	198,900	153,500	134,600	-12%
Mt. Hood	402,200	391,500	339,700	461,700	447,500	-3%
Nugget	5,163,200	6,570,100	4,875,200	4,822,700	4,989,500	3%
Perle	320,400	462,200	502,800	542,000	454,300	-16%
Santiam	-	-	-	-	22,500	-
Sterling	-	-	-	-	105,700	-
Tettnang	843,800	577,600	181,300	107,800	-	-
Willamette	3,755,900	4,505,100	3,473,200	3,284,200	3,318,000	1%
Other Varieties	561,200	443,900	449,700	594,700	847,800	43%
Total Oregon	11,734,500	13,572,000	10,227,400	10,072,000	10,387,000	3%
WASHINGTON						
Cascade	2,110,900	2,032,500	1,785,600	1,821,100	1,798,800	-1%
Chinook	4,244,600	3,079,400	1,570,900	1,582,000	1,311,200	-17%
Cluster	9,075,100	6,815,000	4,975,600	2,536,300	1,875,200	-26%
Columbus/Tomahawk	-	-	9,956,500	10,628,800	11,778,000	11%
Eroica	380,600	-	-	-	-	-
Galena	16,447,000	12,736,800	9,824,300	10,615,800	9,538,200	-10%
Golding	94,800	220,600	89,600	51,500	39,500	-23%
Horizon	-	-	97,500	332,300	395,000	19%
Magnum	-	-	-	148,500	118,000	-21%
Mt. Hood	1,279,700	712,800	371,800	426,200	420,900	-1%
Nugget	10,302,500	11,258,600	7,237,400	8,683,700	8,522,200	-2%
Olympic	248,200	249,500	207,900	-	-	-
Perle	293,600	330,200	186,500	292,100	215,900	-26%
Tettnang	2,329,500	1,923,700	226,800	129,000	-	-
Willamette	4,646,400	6,488,500	4,628,000	4,844,200	4,888,400	1%
Zeus	-	-	-	3,480,800	5,381,800	55%
Other Varieties:						
High Alpha	4,671,000	7,100,000	2,221,000	1,865,500	3,997,600	114%
Alpha	375,100	483,000	411,600	240,800	165,000	-31%
Aroma	208,000	310,400	220,000	222,000	374,000	68%
Other	839,000	2,075,000	780,000	1,748,400	1,439,700	-18%
Total Washington	57,546,000	55,816,000	44,791,000	49,649,000	52,260,000	5%
Total United States	74,876,500	74,892,100	59,549,800	64,455,000	67,576,800	5%

SOURCE: U.S.D.A. Prepared by HGA. - Included in the category "other varieties" to avoid disclosure of individual operations.

U.S. HOP ACREAGE BY STATE AND VARIETY 1996 – 2000

STATE & VARIETY	ACRES HARVESTED					
	1996	1997	1998	1999	2000	% +/-
IDAHO						
Banner	77	73	-	-	-	-
Chinook	343	342	384	202	170	-16%
Cluster	815	797	657	417	198	-53%
Galena	649	666	733	625	535	-14%
Horizon	-	-	-	7	-	-
Mt. Hood	20	10	10	32	53	66%
Nugget	37	65	97	89	68	-24%
Willamette	190	211	225	248	194	-22%
Zeus	-	-	-	201	403	100%
Other Varieties	1,866	1,706	1,803	1,541	1,700	10%
Total Idaho	3,997	3,870	3,909	3,362	3,321	-1%
OREGON						
Fuggle	481	423	189	98	63	-36%
Golding	-	245	235	110	115	5%
Mt. Hood	238	238	225	253	250	-1%
Nugget	3,101	3,063	2,415	2,153	2,308	7%
Perle	181	329	385	406	402	-1%
Santiam	-	-	-	-	17	-
Sterling	-	-	-	-	62	-
Tettnang	796	649	154	88	-	-
Willamette	3,259	3,070	2,290	2,321	2,142	-8%
Other Varieties	430	335	268	393	460	17%
Total Oregon	8,486	8,352	6,161	5,822	5,819	-0.05%
WASHINGTON						
Cascade	1,045	1,037	992	906	996	10%
Chinook	2,234	1,692	1,007	791	670	-15%
Cluster	4,853	3,625	2,605	1,321	939	-29%
Columbus/Tomahawk	-	-	3,999	4,374	4,594	5%
Eroica	183	-	-	-	-	-
Galena	7,984	6,960	5,779	5,282	5,044	-5%
Golding	87	161	83	35	36	3%
Horizon	-	-	130	268	316	18%
Magnum	-	-	-	99	73	-26%
Mt. Hood	955	540	361	384	367	-4%
Nugget	5,539	5,492	4,793	4,195	4,597	10%
Olympic	126	126	126	-	-	-
Perle	233	256	296	273	275	0.7%
Tettnang	1,991	1,564	252	129	-	-
Willamette	3,520	4,297	3,922	3,364	3,563	6%
Zeus	-	-	-	1,520	1,994	31%
Other Varieties:						
High Alpha	1,990	3,594	1,116	911	2,257	148%
Alpha	185	334	292	137	106	-23%
Aroma	164	209	251	206	330	60%
Other	495	1,193	569	881	824	-6%
Total Washington	31,678	31,080	26,573	25,076	26,980	8%
Total United States	44,161	43,302	36,643	34,260	36,120	5%

SOURCE: U.S.D.A. Prepared by HGA. - Included in the category "other varieties" to avoid disclosure of individual operations.

U.S. HOP YIELDS BY STATE AND VARIETY 1996 – 2000

STATE & VARIETY	YIELDS (Pounds per Acre)					% +/-
	1996	1997	1998	1999	2000	
IDAHO						
Banner	1,700	1,896	-	-	-	-
Chinook	1,666	1,789	1,322	1,900	2,000	5%
Cluster	2,012	1,966	1,349	1,666	1,943	17%
Galena	1,653	1,577	1,222	1,679	1,815	8%
Horizon	-	-	-	1,000	-	-
Mt. Hood	1,630	1,750	1,500	716	2,000	179%
Nugget	738	1,112	1,360	1,713	2,000	17%
Willamette	736	713	714	1,343	1,534	14%
Zeus					2,046	-
Other Varieties	1,062	1,100	1,072	1,099	1,100	0%
Total Idaho	1,399	1,487	1,220	1,408	1,484	5%
OREGON						
Fuggle	1,430	925	1,093	1,076	1,065	-1%
Golding	-	940	846	1,395	1,170	-16%
Mt. Hood	1,690	1,645	1,510	1,825	1,790	-2%
Nugget	1,665	2,145	2,019	2,240	2,162	-3%
Perle	1,770	1,405	1,306	1,335	1,130	-15%
Santiam					1,324	-
Sterling					1,705	-
Tettnang	1,060	890	1,177	1,225	-	-
Willamette	1,152	1,467	1,517	1,415	1,549	9%
Other Varieties	1,305	1,325	1,678	1,513	1,843	22%
Total Oregon	1,439	1,343	1,393	1,730	1,785	3%
WASHINGTON						
Cascade	2,020	1,960	1,800	2,010	1,806	-10%
Chinook	1,900	1,820	1,560	2,000	1,957	-2%
Cluster	1,870	1,880	1,910	1,920	1,997	4%
Columbus/Tomahawk	-	-	2,490	2,430	2,564	6%
Eroica	2,080	-	-	-	-	-
Galena	2,060	1,830	1,700	2,010	1,891	-6%
Golding	1,090	1,370	1,080	1,470	1,098	-25%
Horizon	-	-	750	1,240	1,250	1%
Magnum	-	-	-	1,500	1,616	8%
Mt. Hood	1,340	1,320	1,030	1,100	1,147	4%
Nugget	1,860	2,050	1,510	2,070	1,854	-10%
Olympic	1,970	1,980	1,650	-	-	-
Perle	1,260	1,290	630	1,070	785	-27%
Tettnang	1,170	1,230	900	1,000	-	-
Willamette	1,320	1,510	1,180	1,440	1,372	-5%
Zeus	-	-	-	2,290	2,699	18%
Other Varieties:						
High Alpha	2,347	1,976	1,990	2,048	1,772	-13%
Alpha	2,028	1,446	1,410	1,758	1,557	-11%
Aroma	1,268	1,485	876	1,078	1,134	5%
Other	1,695	1,739	1,371	1,985	1,748	-12%
Total Washington	1,663	1,659	1,402	1,980	1,937	-2%
Total United States	1,501	1,497	1,338	1,884	1,871	-1%

SOURCE: U.S.D.A. Prepared by HGA. - Included in the category "other varieties" to avoid disclosure of individual operations.

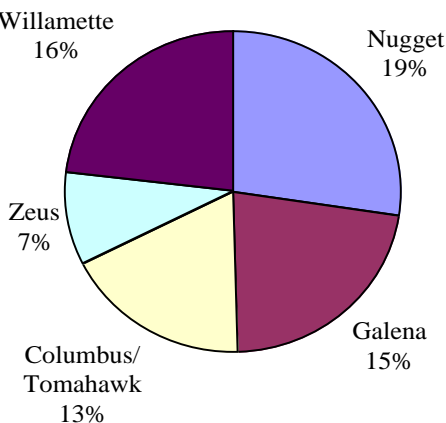
U.S. HOP ACREAGE TRENDS ALPHA & AROMA VARIETIES 1996–2000

ALPHA VARIETIES	1996	1997	1998	1999	2000	% +/-
Nugget	8,640	8,620	7,305	6,437	6,973	8%
Galena	8,633	7,626	6,512	5,907	5,579	-6%
Columbus/Tomahawk	-	-	3,999	4,374	4,594	5%
Cluster	5,668	4,422	3,262	1,738	1,137	-35%
Chinook	2,577	2,034	1,391	993	840	-15%
Olympic	126	126	126	-	-	-
Zeus	-	-	-	1,721	2,397	39%
Other Varieties:						
High Alpha Hops	1,990	3,594	1,116	911	2,257	148%
Alpha Hops	185	334	292	137	106	-23%
Other	623	647	528	881	824	-6%
TOTAL	28,625	27,403	24,531	22,869	24,707	8%
TOTAL U.S.	44,161	43,302	36,643	34,260	36,120	5%
% of TOTAL	65%	63%	67%	67%	68%	-

AROMA VARIETIES	1996	1997	1998	1999	2000	% +/-
Willamette	6,779	7,578	6,437	5,933	5,899	-1%
Cascade	1,045	1,037	992	906	996	10%
Perle	414	585	681	679	677	-0.3%
Mt. Hood	1,193	788	596	669	670	0%
Tettnang	2,787	2,213	406	217	-	-
Golding	87	406	318	145	151	4%
Fuggle	481	423	189	98	63	-36%
Horizon	-	-	130	275	316	15%
Santiam	-	-	-	-	17	-
Sterling	-	-	-	-	62	-
Other	2,656	2,796	2,363	2,469	2,490	1%
TOTAL	15,536	15,899	12,112	11,391	11,341	-0.4%
TOTAL U.S.	44,161	43,302	36,643	34,260	36,120	5%
% of TOTAL	35%	37%	33%	33%	31%	-

SOURCE: USDA, Prepared by HGA

TOP 5 VARIETIES IN THE UNITED STATES AND THE PERCENTAGE OF THE CROP THEY REPRESENT

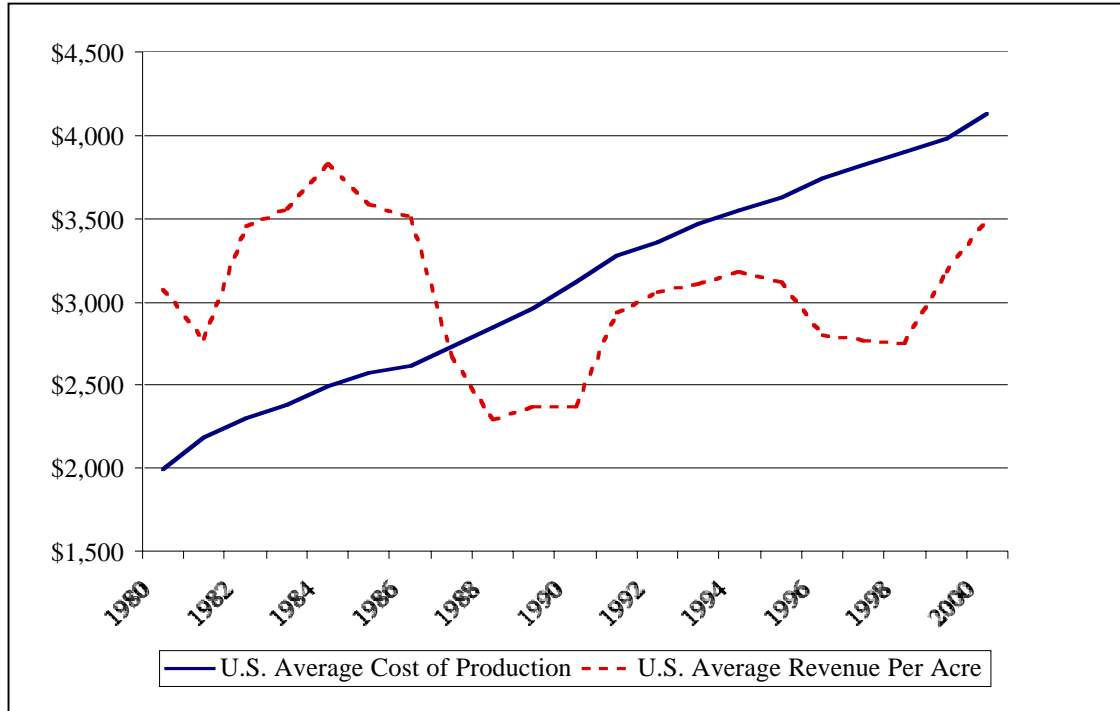


U.S. HOPS: SEASON AVERAGE PRICE & TOTAL CROP VALUE

Marketing Year	SEASON AVERAGE PRICE				U.S. Production (1,000 lbs)	Total Crop Value (x 1,000)
	Washington	Oregon	Idaho	U.S.		
	----- (\$ / pound) -----					
1980	\$1.54	\$1.44	\$1.42	\$1.51	75,560	\$114,194
1981	\$1.50	\$1.47	\$1.65	\$1.51	79,144	\$119,220
1982	\$1.60	\$1.97	\$2.48	\$1.74	78,550	\$136,884
1983	\$1.80	\$2.15	\$2.62	\$1.93	68,111	\$131,483
1984	\$1.99	\$2.10	\$2.92	\$2.10	56,167	\$117,701
1985	\$1.80	\$2.36	\$3.18	\$2.03	49,713	\$98,433
1986	\$1.59	\$2.08	\$2.59	\$1.78	49,062	\$87,087
1987	\$1.32	\$1.78	\$2.74	\$1.51	50,048	\$75,578
1988	\$1.36	\$1.64	\$1.09	\$1.40	54,696	\$76,415
1989	\$1.33	\$1.58	\$1.26	\$1.38	59,326	\$81,583
1990	\$1.44	\$1.63	\$1.50	\$1.48	56,855	\$84,178
1991	\$1.68	\$1.71	\$1.59	\$1.68	69,155	\$115,997
1992	\$1.72	\$1.86	\$1.69	\$1.74	74,337	\$129,096
1993	\$1.72	\$1.95	\$1.77	\$1.76	76,144	\$133,965
1994	\$1.77	\$1.96	\$1.79	\$1.81	74,560	\$134,701
1995	\$1.68	\$1.90	\$1.61	\$1.71	78,852	\$135,087
1996	\$1.63	\$1.81	\$1.49	\$1.65	74,970	\$123,530
1997	\$1.60	\$1.68	\$1.41	\$1.60	74,872	\$119,840
1998	\$1.64	\$1.98	\$1.55	\$1.69	59,548	\$100,728
1999	\$1.63	\$2.04	\$1.61	\$1.69	64,455	\$109,099
2000	\$1.82	\$2.19	\$1.78	\$1.87	67,576.	\$126,636

SOURCE: USDA, Prepared by HGA

U.S. AVERAGE COST OF PRODUCTION PER ACRE VERSUS AVERAGE REVENUE PER ACRE 1980-2000

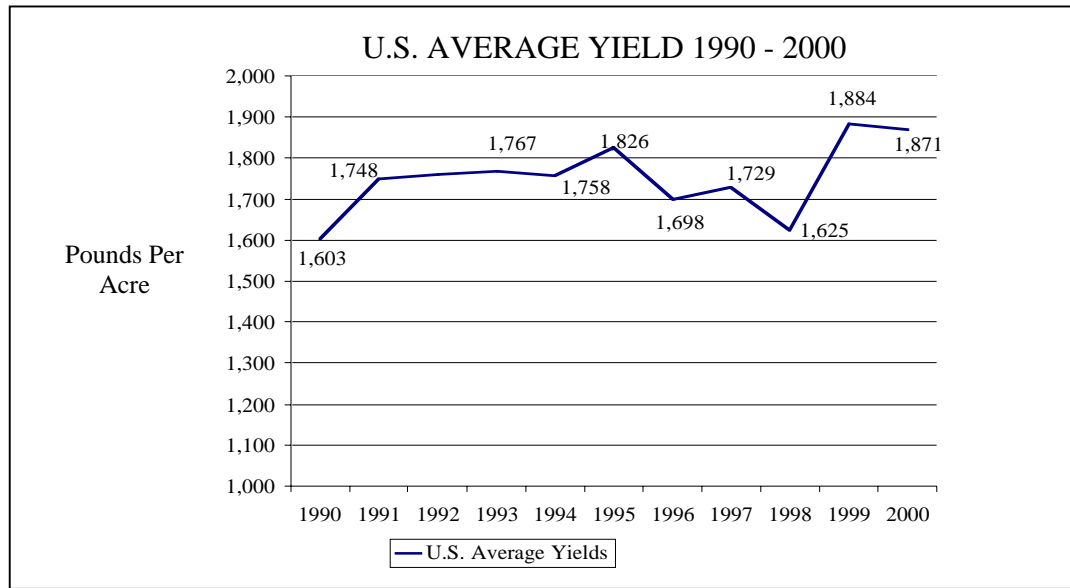


Average Cost of Production calculated by taking 1999 HGA cost study estimates and adjusting for inflation. Inflation rates provided by U.S. Bureau of Labor Statistics.

U.S. HOP ACREAGE BY STATE 1990 – 2000

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
1990	25,663	7,100	2,700	35,463
1991	28,245	7,190	4,118	39,553
1992	30,366	7,900	4,000	42,266
1993	31,239	7,900	3,961	43,100
1994	30,375	8,000	4,037	42,412
1995	30,621	8,641	3,927	43,189
1996	31,678	8,486	3,997	44,161
1997	31,080	8,352	3,870	43,302
1998	26,573	6,161	3,909	36,643
1999	25,076	5,822	3,362	34,260
2000	26,980	5,819	3,321	36,120

SOURCE: USDA, Prepared by HGA



U.S. AVERAGE HOP YIELDS 1990 - 2000

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL U.S.
1990	1,634	1,530	1,500	1,603
1991	1,896	1,415	1,319	1,748
1992	1,881	1,479	1,387	1,759
1993	1,884	1,500	1,375	1,767
1994	1,800	1,715	1,527	1,758
1995	1,930	1,595	1,520	1,826
1996	1,820	1,383	1,400	1,698
1997	1,796	1,625	1,417	1,729
1998	1,686	1,660	1,159	1,625
1999	1,980	1,730	1,408	1,884
2000	1,937	1,785	1,484	1,871

SOURCE: USDA, Prepared by HGA

WORLD ALPHA PRODUCTION & CONSUMPTION 1990 - 2000

ALPHA PRODUCTION (1,000 lbs.)		ALPHA CONSUMPTION (1,000 lbs.)			
Year	World Total	Year	Alpha Dosage grams alpha / hl	Alpha Consumption	Surplus/ Deficit
1990	15,184	1991	6.8	17,445	-2,261
1991	19,191	1992	6.8	17,317	1,874
1992	16,666	1993	6.7	17,510	-844
1993	20,278	1994	6.6	17,776	2,502
1994	15,207	1995	6.3	17,462	-2,255
1995	17,206	1996	6.3	17,476	-270
1996	20,576	1997	6.1	17,428	3,148
1997	19,850	1998	5.9	16,892	2,958
1998	15,489	1999	5.7	16,529	-1,040
1999	15,882	2000	5.5	16,261	-379
2000*	16,253	2001	5.55	17,214	-960

SOURCE: IHGC, 2000 Hop Merchant Reports, Prepared by HGA

* Consumption estimated by calculating averages from both Steiner and Barth report projections. Alpha production taken directly from November IHGC report and includes 594,000 pounds of alpha destroyed in the 2000 Yakima warehouse fires.

2000 WORLD HOP ACREAGE AND PRODUCTION

COUNTRY	2000 HOP ACREAGE ACRES				2000 HOP PRODUCTION 000 POUNDS			
	AROMA	ALPHA	TOTAL	NEW (baby)	AROMA	ALPHA	TOTAL	ALPHA PROD. MT.
Australia	9	1,997	2,007	0	14.5	4,649.9	4,664.5	256.7
Belgium	185	427	612	0	248	834	108.1	47.6
Bulgaria	222	641	864	0	113.5	370.9	484.4	N/A
China	237	10,592	10,829	0	523.8	32,629.1	33,152.9	N/A
Czech Rep.	14,693	355	15,049	790	9,695.8	634.9	10,330.7	180.8
Germany	25,612	17,995	43,607	2,308	34,729.3	27,980.2	62,709.6	2526
France	1,809	125	1,935	76	3,473.8	221.5	3,695.4	62.2
New Zealand	429	511	940	0	758.1	1,073	1,831.2	105.5
Poland	3,580	1,851	5,432	0	3,196.6	2,425	5,621.7	170.7
Portugal	0	103	103	0	0	92.9	92.9	4.8
Russia	2,681	1,079	3,760	158	1,256.9	558.7	1,815.7	33.6
Slovakia	864	0	864	0	485	0	485	7.7
Slovenia	4,138	172	4,311	303	3,716.9	231.4	3,948.4	136.1
Spain	0	1,906	1,906	123	0	3,114.5	3,114.5	149.7
UK - England	2,797	1,859	4,656	172	3,588.3	2,494.6	6,082.9	229.3
Ukraine	2,370	740	3,111	987	1,216.9	440.9	1,657.8	38.7
USA	10,807	25,597	36,404	0	13,774.1	54,244.8	68,019	3290*
Yugoslavia	321	792	1,113	24	229.2	566.1	795.4	22.1
South Africa	0	1,172	1,172	0	0	1,918.4	1,918.4	89.6
2000 IHGC	70,538	67,281	136,125	4,945	76,907.9	134,110	211,018	7352*
Totals								
1999 IHGC	72,814	63,604	136,417	3,246	84,194.6	120,919	207,004	6279
Totals								
Diff. '00 vs. '99	2,276	3,677	-292	1,699	-7,286.7	13,191.6	4,014	1073
% Diff. '00 vs. '99	-3.1%	5.7%	-0.2%	52.3%	-8.6%	10.9%	1.9%	17.08%

SOURCE: November 2000 IHGC Report

*Includes approximately 270 metric tons of alpha acid destroyed by fire in Yakima.

IHGC AROMA ACREAGE 1996 – 2000

COUNTRY	AROMA ACREAGE					2000 % +/-
	1996	1997	1998	1999	2000	
Australia	207	222	148	10	9	-10.0%
Belgium	200	230	217	199	185	-7.0%
Bulgaria	370	259	259	N/A	222	N/A
China	No Data	No Data	No Data	237	237	0.0%
Czech Rep.	23,099	17,373	14,321	14,614	14,693	0.5%
Germany	31,212	31,788	0	26,202	25,612	-2.3%
France	1,459	1,548	1,733	1,802	1,809	0.4%
New Zealand	222	262	346	387	429	10.9%
Poland	5,054	4,642	3,654	3703	3,580	-3.3%
Portugal	No Data	No Data	No Data	0	0	N/A
Russia	6,074	3,400	2,494	3,111	2,681	-13.8%
Slovakia	2,469	1,975	1,111	864	864	0.0%
Slovenia	5,289	5,035	4,649	4,214	4,138	-1.8%
Spain	0	0	0	0	0	N/A
UK - England	4,420	4,353	3,835	3,246	2,797	-13.8%
Ukraine	7,901	4,444	4,049	2,380	2,370	-0.4%
USA	15,523	15,886	12,015	10,928	10,807	-1.1%
Yugoslavia	449	449	449	449	321	-28.5%
South Africa	No Data	No Data	No Data	0	0	N/A
IHGC Total	103948	91866	49280	72346	70754	-2.2%

SOURCE: IHGC November 2000 Report

IHGC ALPHA ACREAGE 1996 – 2000

COUNTRY	ALPHA ACREAGE					2000 % +/-
	1996	1997	1998	1999	2000	
Australia	2,304	2,378	1,447	2,069	1,997	-3.5%
Belgium	642	523	435	428	427	-0.2%
Bulgaria	877	691	691	N/A	641	N/A
China	No Data	No Data	No Data	10,133	10,592	4.5%
Czech Rep.	0	0	99	177	355	100.6%
Germany	17,941	17,067	0	17,459	17,995	3.1%
France	185	156	128	133	125	-6.0%
New Zealand	654	612	516	501	511	2.0%
Poland	1,119	1,481	1,481	1,728	1,851	7.1%
Portugal	No Data	No Data	No Data	158	103	-34.8%
Russia	810	790	790	938	1,079	15.0%
Slovakia	0	0	0	0	0	N/A
Slovenia	207	222	123	74	172	132.4%
Spain	1,407	1,279	2,040	1,962	1,906	-2.9%
UK - England	2,990	2,153	1,570	2,054	1,859	-9.5%
Ukraine	852	741	889	647	740	14.4%
USA	28,602	27,383	24,326	23,330	25,597	9.7%
Yugoslavia	993	993	993	990	792	-20.0%
South Africa	No Data	No Data	No Data	1,214	1,172	-3.5%
IHGC Total	59,583	56,469	35,528	63,995	67,914	6.1%

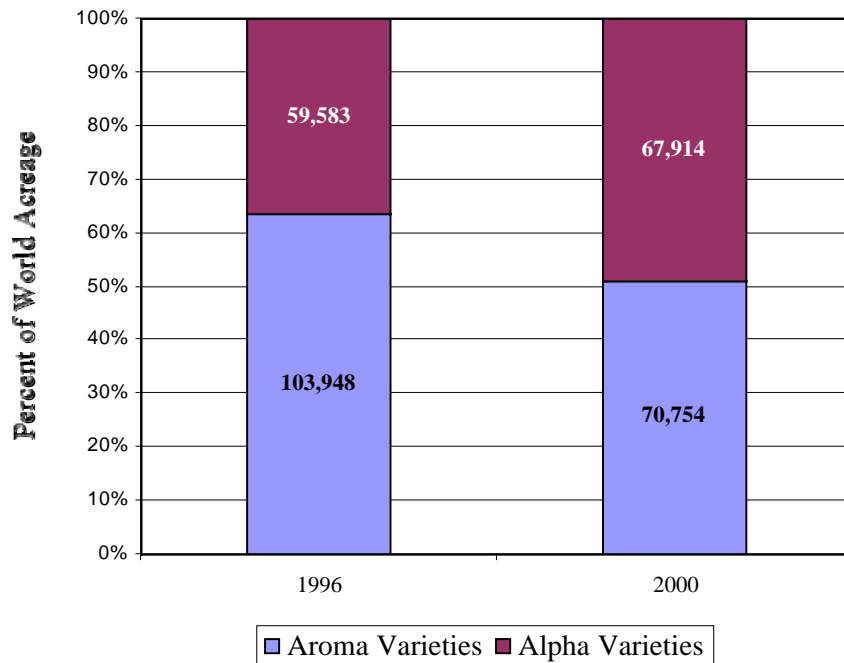
SOURCE: IHGC November 2000 Report

IHGC TOTAL ACREAGE 1996 – 2000

COUNTRY	TOTAL ACREAGE					2000
	1996	1997	1998	1999	2000	% +/-
Australia	2,511	2,600	1,595	2,079	2,007	-3.5%
Belgium	948	827	652	627	612	-2.4%
Bulgaria	1,247	951	951	No Data	864	-
China	No Data	No Data	No Data	10,370	10,829	4.4%
Czech Rep.	23,198	18,435	15,215	15,735	15,839	0.7%
Germany	53,956	52,790	46,376	45,181	45,915	1.6%
France	1,763	1,916	1,968	2,012	2,011	-0.05%
New Zealand	877	874	862	888	940	5.9%
Poland	6,417	6,123	5,136	5,432	5,432	0.0%
Portugal	No Data	No Data	No Data	158	103	-34.8%
Russia	6,914	4,190	3,304	4,152	3,918	-5.6%
Slovakia	2,469	1,975	1,111	864	864	0.0%
Slovenia	5,837	5,257	4,958	4,500	4,614	2.5%
Spain	2,304	2,081	2,040	2,085	2,029	-2.7%
UK - England	8,099	7,099	5,640	5,301	4,828	-8.9%
Ukraine	8,953	5,432	5,309	3,293	4,098	24.4%
USA	44,126	43,269	36,341	34,260	36,404	6.3%
Yugoslavia	1,442	1,442	1,442	1,439	1,137	-21.0%
South Africa	No Data	No Data	No Data	1,214	1,172	-3.5%
IHGC Total	171,061	155,261	88,761	139,590	143,616	2.9%

SOURCE: IHGC November 2000 Report
 IHGC Total Acreage includes baby acreage (not included in separate aroma and alpha tables).

**COMPOSITION OF WORLD HOP ACREAGE
 1996 VERSUS 2000**



IHGC SOLD AHEAD SURVEY 2000 – 2004

COUNTRY	2000 PRODUCTION	2000	(% contracted based on 2000 production)			
			2001	2002	2003	2004
Australia	4,664,493	-	-	-	-	-
Austria	648,814	85%	85%	85%	40%	40%
Belgium	1,082,018	12%	8%	2%	-	-
Bulgaria	484,400	-	-	-	-	-
China	33,152,995	95%	-	-	-	-
Czech Rep.	10,330,756	100%	80%	80%	65%	41%
Germany	62,709,627	74%	60%	51%	37%	21%
France	3,915,921	80%	86%	-	-	-
New Zealand	1,831,251	81%	50%	32%	30%	28%
Poland	5,621,730	-	-	-	-	-
Portugal	92,924	100%	-	-	-	-
Russia	1,815,709	65%	-	-	-	-
Slovakia	485,012	100%	85%	85%	85%	-
Slovenia	3,948,439	65%	40%	30%	20%	20%
Spain	3,114,549	87%	100%	-	-	-
UK - England	6,082,932	80%	50%	30%	10%	-
Ukraine	1,657,859	100%	150%	193%	233%	249%
USA	67,576,722	90%	64%	43%	32%	12%
Yugoslavia	795,420	-	-	-	-	-
South Africa	1,918,443	100%	-	-	-	-
TOTAL IHGC	211,445,611	169,824,597	104,695,293	77,084,977	58,024,058	31,203,871
IHGC Contracted	-	80%	50%	36%	27%	15%

SOURCE: IHGC, USDA. Prepared by HGA
 -/ information not reported to IHGC

U.S. ADJUSTED SOLD AHEAD SURVEY RESULTS 1996 – 2000

REPORT YEAR (N)	REPORT YEAR PRODUCTION	Percent Sold Ahead Based on Report Year Production				
		(N)	(N+1)	(N+2)	(N+3)	(N+4)
1996	74,876,500	90%	86%	68%	41%	27%
1997	74,892,100	89%	80%	58%	47%	15%
1998	59,549,800	122%	84%	70%	40%	13%
1999	64,455,000	81%	63%	42%	32%	10%
2000	67,576,800	90%	64%	43%	32%	12%

- The U.S. Sold Ahead survey is issued using crop production figures from the previous year (N-1). In hindsight, to provide a more accurate picture of the actual percentage of the crop contracted, these figures must be adjusted once the current year's production has been measured.
- The U.S. Sold Ahead percentages listed above include both alpha and aroma hops. Aroma varieties comprise approximately one-third of the entire crop and are often 90%+ contracted.

WORLD HOP ACREAGE & PERCENT SHARE (acres)

COUNTRY	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Germany	55,785 24%	56,680 24%	56,875 25%	54,189 25%	54,078 25%	53,897 26%	52,830 30%	48,638 33%	45,177 32%	45,915 32%
England	8,896 4%	8,431 4%	8,332 4%	7,863 4%	7,781 4%	7,843 4%	7,764 4%	6,047 4%	5,636 4%	4,828 3%
Czech/Slovak	28,738 12%	28,664 12%	28,663 12%	28,169 13%	27,601 13%	25,587 13%	20,411 12%	15,091 10%	15,842 11%	16,703 12%
Europe (rest)	66,025 28%	65,696 28%	57,948 25%	52,541 24%	48,674 23%	41,500 20%	32,447 18%	25,840 17%	24,844 17%	25,682 18%
USA	39,553 17%	42,266 18%	43,100 19%	42,412 19%	43,189 20%	44,161 22%	43,301 24%	36,673 25%	34,260 24%	36,404 25%
China	n/a -	19,700 8%	19,800 9%	19,800 9%	17,300 8%	16,300 8%	12,355 7%	10,556 7%	10,556 7%	10,829 7%
World (rest)	35,140 15%	14,630 6%	14,977 7%	14,677 7%	14,557 7%	14,250 7%	7,645 4%	6,577 4%	6,530 5%	3,255 2%
World Totals	234,137	236,067	229,695	219,651	213,180	203,538	176,753	149,422	142,845	143,616

WORLD HOP PRODUCTION & PERCENT SHARE (pounds x 1,000)

COUNTRY	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Germany	80,367 28%	64,239 24%	93,626 31%	62,687 24%	75,224 27%	81,571 29%	74,957 30%	68,166 33%	60,462 29%	62,709 30%
England	13,265 5%	11,084 4%	12,364 4%	10,709 4%	9,106 3%	11,250 4%	9,433 4%	7,209 3%	6,945 3%	6,082 3%
Czech/Slovak	24,471 9%	20,393 8%	23,243 8%	22,642 9%	24,136 9%	24,141 9%	18,105 7%	11,751 6%	14,771 7%	10,815 5.1%
Europe (rest)	54,500 19%	51,572 19%	49,564 16%	40,258 15%	41,235 15%	35,819 13%	29,533 12%	24,857 12%	25,904 13%	23,174 11%
USA	69,155 24%	74,337 28%	76,144 25%	74,560 28%	78,852 28%	74,971 27%	74,872 30%	59,548 29%	64,455 31%	67,576 32%
China	n/a -	26,455 10%	29,762 10%	38,500 15%	35,275 13%	35,274 13%	26,786 11%	26,581 13%	26,455 13%	33,152 15%
World (rest)	45,540 16%	20,598 8%	19,865 7%	12,700 5%	17,762 6%	17,538 6%	12,566 5%	8,823 4%	7,685 4%	7,937 4%
World Totals	287,298	268,678	304,568	262,056	281,590	280,563	246,252	206,935	206,677	211,445

SOURCE: USDA, IHGC, Merchant Reports. Prepared by HGA

SEPTEMBER 1 U.S. HOP STOCKS 1980 – 2000

Year	(1,000 pounds)			TOTAL
	Brewer	Dealer	Grower	
1980	31,420	1,380	0	32,800
1981	32,240	1,950	240	34,430
1982	43,740	2,090	1,200	47,030
1983	56,700	3,000	1,380	61,080
1984	60,480	6,256	1,360	68,096
1985	58,130	10,930	1,400	70,460
1986	60,630	8,930	1,390	70,950
1987	62,430	6,580	1,620	70,630
1988	49,090	9,160	1,750	60,000
1989	43,200	8,500	-	51,700
1990	46,810	5,080	-	51,890
1991	45,200	9,000	-	54,200
1992	46,270	9,980	-	56,250
1993	45,520	12,540	-	58,060
1994	47,070	15,930	-	63,000
1995	42,800	13,100	-	55,900
1996	47,000	11,700	-	58,700
1997	44,500	17,500	-	62,000
1998	41,000	14,000	-	55,000
1999	39,500	14,500	-	54,000
2000	37,500	10,500	-	48,000

SOURCE: USDA NASS. Prepared by HGA.

-/ included in dealer stocks to avoid disclosure of individual operations.

U.S. HOP TRADE BALANCE

Year	Value of Hop Imports ¹	Value of U.S. Hop Exports ² ----- (x US\$1,000) -----	TRADE SURPLUS
1990-91	\$39,787	\$73,852	\$34,065
1991-92	\$41,226	\$103,914	\$62,688
1992-93	\$23,661	\$108,275	\$84,614
1993-94	\$40,668	\$98,400	\$57,732
1994-95	\$41,415	\$126,400	\$84,985
1995-96	\$41,856	\$105,304	\$63,448
1996-97	\$39,232	\$99,245	\$60,013
1997-98	\$29,273	\$97,603	\$68,330
1998-99	\$28,733	\$77,615	\$48,882
1999-00	\$28,916	\$89,623	\$60,707

SOURCE USDA Hop Market News. Prepared by HGA

1/ Import price is defined generally as market value in foreign country excluding import duties, ocean freight and marine insurance

2/ Export price is value of exportation based on selling price, inland freight, insurance and other charges to port.

2000 HOP INSPECTION REPORT

TABLE 1. Total Number of Bales Inspected – Weighted Average of Leaf & Stem in Parenthesis

YEAR	WASHINGTON (%)	OREGON (%)	IDAHO (%)	TOTAL (%)
1996	282,215 (0.48)	59,415 (1.14)	27,729 (0.69)	369,359 (0.60)
1997	276,311 (0.52)	68,722 (0.64)	27,238 (0.66)	372,271 (0.55)
1998	215,726 (0.11)	51,739 (0.21)	21,217 (0.09)	288,682 (0.12)
1999	235,356 (0.06)	50,281 (0.21)	21,729 (0.05)	307,366 (0.08)
2000	249,607 (0.11)	52,163 (0.23)	22,851 (0.01)	324,621 (0.12)

TABLE 2. Number of Bales in Each Leaf & Stem Category – Percent of Total in Parenthesis

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	227,337 (91)	19,516 (8)	1,296 (1)	445 (<1%)	445 (<1%)	-	-	-	249,607
OR	40,840 (79)	10,596 (20)	584 (1)			-	-	-	52,163
ID	22,651 (99)	200 (1)	-			-	-	-	22,851
Total	290,828	30,312	711	445	445	-	-	-	324,621
% of Total	(90)	(9)	(<1%)	(<1%)	(<1%)				(100)

TABLE 3. Number of Bales in Each Seed Category – Percent of Total in Parenthesis

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	182,187 (73)	41,939 (17)	12,129 (5)	5,615 (2)	4,163 (2)	2,004 (1)	200 (0)	1,370 (0)	249,607
OR	17,002 (33)	13,228 (20)	5,455 (11)	3,328 (6)	4,887 (9)	2,886 (6)	2,251 (4)	3,126 (6)	52,163
ID	20,796 (91)	1,600 (7)	426 (2)	-	-	-	-	-	22,851
Total	219,985	56,767	18,010	8,943	9,050	4,890	2,451	4,525	324,621
% of Total	(68)	(17)	(6)	(3)	(3)	(2)	(-)	(1)	(100)

SOURCE: USDA, GIPSA, Federal Grain Inspection Service

U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE 1990 – 2000

Year	WASHINGTON	OREGON	IDAHO	U.S. AVERAGE	
	Leaf & Stem	Leaf & Stem	Leaf & Stem	Leaf & Stem	Seed Content
1990	1.01	1.35	1.11	1.09	0.74
1991	0.78	1.39	0.35	0.85	1.15
1992	0.96	1.62	1.02	0.93	0.67
1993	0.71	1.16	0.87	0.79	0.91
1994	0.62	1.12	0.99	0.75	0.54
1995	0.73	1.02	0.97	0.80	0.62
1996	0.48	1.14	0.69	0.60	0.55
1997	0.52	0.64	0.66	0.55	1.15
1998	0.11	0.21	0.09	0.12	0.54
1999	0.06	0.21	0.05	0.08	1.15
2000	0.11	0.23	0.01	0.12	1.18

SOURCE: USDA Federal Grain Inspection Service. Prepared by HGA

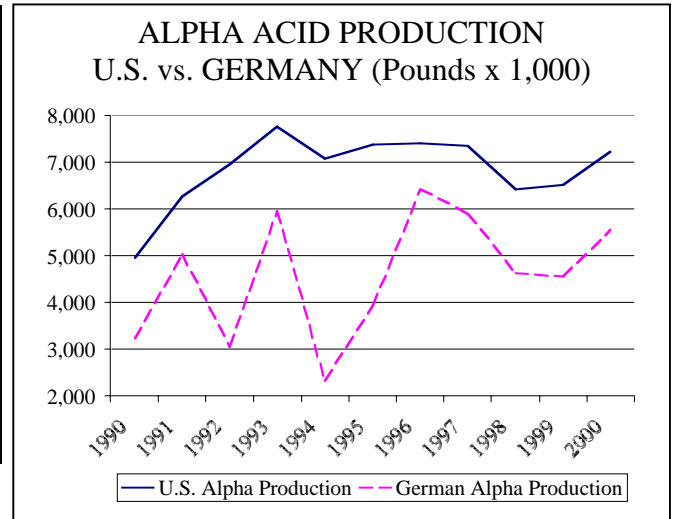
U.S. ALPHA ACID BY VARIETY

VARIETY	1996	1997	1998	1999	2000
Tettnanger	4.2%	4.2%	2.9%	4.8%	4.7%
Mt. Hood	4.3%	4.8%	4.0%	5.0%	4.3%
Willamette	4.2%	4.2%	4.3%	5.5%	4.7%
Cascade	6.0%	5.5%	5.0%	5.6%	5.8%
Perle	Not Reported	Not Reported	4.5%	7.0%	7.2%
Cluster	7.0%	7.1%	6.8%	7.5%	7.9%
Chinook	12.2%	11.4%	11.4%	12.0%	11.8%
Galena	12.3%	11.8%	11.9%	12.5%	13.2%
Nugget	13.6%	13.3%	12.5%	13.0%	13.6%
Super Alphas	Not Reported	Not Reported	14.5%	14.0%	14.4%

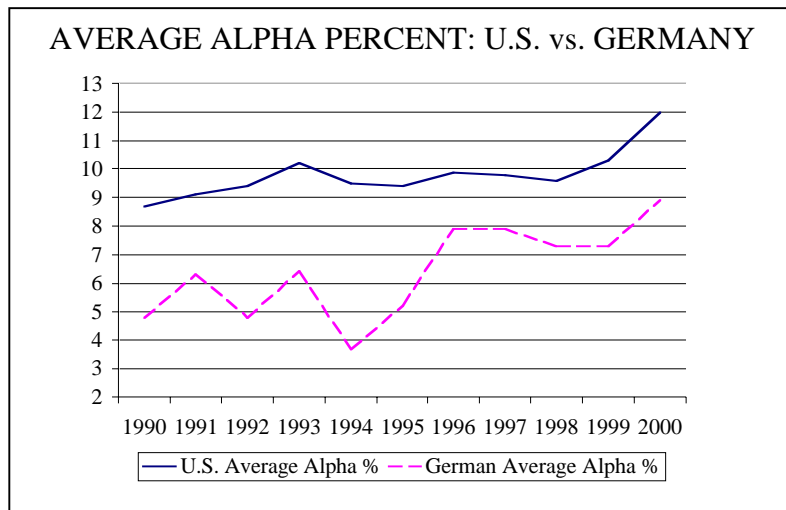
SOURCE: Hop Merchants
 Figures Represent estimated alpha percentages as of 12/31/00 (ASBC-Spectro)

U.S. & GERMAN ALPHA ACID PRODUCTION 1990-2000

YEAR	UNITED STATES		GERMANY	
	Pounds x 1,000	Avg Alpha*	Pounds x 1,000	Avg. Alpha
1990	4,958	8.7	3,232	4.8
1991	6,277	9.1	5,042	6.3
1992	6,953	9.4	3,053	4.8
1993	7,767	10.2	5,970	6.4
1994	7,086	9.5	2,335	3.7
1995	7,387	9.4	3,937	5.2
1996	7,396	9.9	6,424	7.9
1997	7,352	9.8	5,911	7.9
1998	6,420	9.6	4,630	7.3
1999	6,525**	10.3	4,554	7.3
2000	7,238***	12.0	5,557	8.9



SOURCE: Hop Merchants, Prepared by HGA
 * U.S. figures were converted to comparable EBC October/November figures for more accurate comparison
 ** Does not include 1.5 million pounds of hops destroyed by fire
 *** Includes 4 million pounds of hops destroyed by fire (approx. 594,000 pounds of alpha acid)



U.S. HOP EXPORTS – TOP 20 DESTINATIONS FOR U.S. HOPS

SEPTEMBER 1999 – AUGUST 2000 (pounds)						
COUNTRY		CONES	PELLETS	EXTRACT (Hop Equiv.)	TOTAL	PERCENT OF TOTAL
1	Mexico	138,891	286,601	4,818,197	5,243,689	13%
2	Germany	533,518	1,022,944	3,177,960	4,734,421	12%
3	Brazil	2,674,204	24,251	1,346,361	4,044,816	10%
4	Canada	1,765,901	48,502	1,947,782	3,762,184	9%
5	Belgium	1,272,066	19,842	1,804,261	3,096,168	8%
6	United Kingdom	608,475	246,917	1,640,237	2,495,630	6%
7	Netherlands	17,637	0	1,612,900	1,630,537	4%
8	Hong Kong	209,439	13,228	1,134,497	1,357,164	3%
9	Dominican Republic	4,409	2,205	1,325,858	1,332,472	3%
10	Japan	407,855	231,485	649,261	1,288,600	3%
11	Korea, Republic of	0	134,482	813,284	947,766	2%
12	Philippines	35,274	6,614	867,959	909,847	2%
13	Colombia	88,185	0	710,769	798,954	2%
14	Thailand	745,162	0	34,172	779,333	2%
15	Argentina	185,188	83,776	498,906	767,869	2%
16	Australia	2,205	0	703,935	706,140	2%
17	France	0	0	485,237	485,237	1%
18	Portugal	37,479	2,205	430,562	470,245	1%
19	Venezuela	149,914	2,205	314,379	466,498	1%
20	China, Peoples Republ	85,980	2,205	355,385	443,570	1%
21	Ireland	55,116	0	382,722	437,838	1%
22	Russian Federation	59,525	202,825	136,686	399,036	1%
23	Peru	11,023	0	382,722	393,745	1%
24	Ecuador	0	136,686	239,201	375,888	1%
25	Greece	0	0	328,047	328,047	1%
26	Czech Republic	0	310,851	0	310,851	1%
27	Finland	178,574	0	68,343	246,917	1%
28	Malaysia	24,251	0	211,864	236,115	1%
29	Italy	0	0	177,692	177,692	0.4%
30	Singapore	15,432	0	150,355	165,787	0.4%
SUB TOTAL		2,777,821	9,305,701	26,749,536	38,833,059	95.1%
All Others Combined		97,003	341,716	1,558,226	1,996,944	4.9%
TOTAL EXPORTS		2,874,824	9,647,417	28,307,762	40,830,003	100%

SOURCE: USDA Hop Market News. Prepared by HGA

U.S. HOP EXPORTS – REGIONAL ANALYSIS

REGION	PERCENT OF TOTAL U.S. HOP EXPORTS			
	1996 – 1997	1997 – 1998	1998 - 1999	1999 - 2000
EUROPE	35%	33%	37%	37%
NORTH AMERICA	18%	23%	25%	22%
SOUTH AMERICA	30%	26%	17%	18%
ASIA	11%	13%	9%	16%
CARIBBEAN	1%	1%	5%	4%
ALL OTHERS	5%	4%	7%	3%

SOURCE: USDA Hop Market News. Prepared by HGA

U.S. HOP EXPORTS 1995/96 – 1999/2000 (Pounds x 1,000)

COUNTRY	'95-96	'96-97	'97-98	98-99	99-00
Canada	3,243	3,721	3,329	3,256	3,762
Mexico	4,354	3,677	5,619	5,630	5,244
Costa Rica	34	68	55	27	21
El Salvador	62	54	0	163	7
Guatemala	287	137	7	109	75
Honduras	9	109	21	123	4
Nicaragua	38	48	109	0	49
Dominican Republic	303	248	451	1,300	1,332
Jamaica & Dep	194	157	0	52	161
Trinidad and Tobago	4	45	21	159	7
Argentina	359	1,263	809	631	768
Bolivia	132	201	353	214	122
Brazil	6,947	8,113	4,589	3,209	4,045
Chile	199	253	170	201	142
Colombia	2,488	1,351	2,162	613	799
Ecuador	414	13	281	108	376
Peru	542	491	263	439	394
Uruguay	86	37	95	43	40
Venezuela	525	392	1,256	783	466
Belgium	1,394	814	1,104	1,547	3,096
Denmark	31	21	60	189	104
Finland	0	123	68	75	247
France	540	2,631	1,510	288	485
Germany	7,146	4,013	4,088	3,669	4,734
Hungary	55	21	0	391	0
Ireland	822	1,081	881	939	438
Italy	301	82	0	103	178
Netherlands	1,759	1,328	754	851	1,631
Portugal	27	333	510	291	470
Russian Federation	334	460	179	422	399
Spain	261	333	123	60	35
Switzerland	93	135	157	113	31
United Kingdom	3,798	2,721	3,499	3,413	2,496
Nigeria	75	144	116	321	40
South Africa	33	0	0	66	33
China, Peoples Republ	264	301	614	66	444
Hong Kong	913	1,008	1,364	487	1,357
Japan	1,095	1,331	1,020	1,509	1,289
Korea, Republic of	880	525	393	126	948
Malaysia	170	103	152	173	236
Philippines	759	500	653	855	910
Singapore	68	27	52	75	166
Taiwan	0	369	686	0	0
Australia	505	629	512	803	706
Papua New Guinea	41	280	7	41	21
Sri Lanka	0	0	41	66	4
Thailand	350	122	532	532	779
SUB TOTAL	41,934	39,813	38,665	34,531	39,084
ALL OTHERS	1,298	706	757	1,432	1,746
TOTAL	43,232	40,519	39,422	35,963	40,830

SOURCE: USDA, Hop Market News

U.S. IMPORTS OF HOPS, PELLETS & HOP EXTRACT (Pounds x 1,000)
CONES¹

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Gemany	NZ	Poland	U.K.	Yugo	Other	Total
1990-91	0	95	769	5,245	2,366	441	9,625	18	520	18	0	40	19,137
1991-92	11	0	358	4,489	4,550	586	6,014	55	871	4	0	0	16,938
1992-93	227	0	472	1,102	1,810	567	2,919	0	518	4	110	0	7,729
1993-94	265	0	628	0	1,931	1,082	6,228	300	602	28	0	5	11,069
1994-95	280	0	536	0	1,892	1,177	5,974	0	240	62	13	20	10,194
1995-96	328	0	234	0	278	1,345	7,665	209	237	152	0	68	10,516
1996-97	340	0	185	0	317	1,378	6,607	2	97	159	0	119	9,204
1997-98	7	0	203	0	170	1,283	4,652	2	2	112	0	0	6,431
1998-99	85	44	0	0	130	1,402	6,389	2	0	35	0	2	8,089
1999-00	2	0	2	0	663	1,774	5,760	31	0	205	0	11	8,450

PELLETS

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Gemany	NZ	Poland	U.K.	Yugo	Other	Total
1990-91	276	0	0	110	0	0	375	31	0	37	287	0	1,116
1991-92	723	84	0	44	24	0	750	119	0	42	178	0	1,964
1992-93	9	0	0	0	7	0	831	340	4	79	0	0	1,270
1993-94	0	0	0	0	53	0	1,634	150	0	201	0	0	2,038
1994-95	4	0	0	42	9	47	1,605	410	0	357	0	2	2,476
1995-96	0	0	0	42	15	0	1,642	294	0	450	0	0	2,443
1996-97	0	0	0	0	90	0	2,438	560	0	441	0	31	3,560
1997-98	181	0	0	0	99	0	2,892	514	0	410	0	99	4,195
1998-99	202	0	0	0	44	0	1,426	304	0	223	0	23	2,222
1999-00	220	0	0	0	2	0	1,675	580	20	106	0	0	2,603

EXTRACT – HOP EQUIVALENT (Actual x 4)

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Gemany	NZ	Poland	U.K.	Yugo	Other	Total
1990-91	370	0	0	0	0	0	264	0	0	87	0	0	721
1991-92	0	0	0	0	0	0	28	0	0	16	0	0	44
1992-93	0	0	18	0	0	0	44	0	0	203	0	0	265
1993-94	0	0	0	0	0	0	26	0	0	53	0	0	79
1994-95	0	0	0	0	0	0	0	0	0	97	0	0	97
1995-96	0	0	0	0	0	0	133	0	0	17	0	18	168
1996-97	35	0	0	0	0	0	71	0	0	35	0	0	141
1997-98	0	0	0	0	0	0	335	0	0	9	0	0	344
1998-99	0	0	0	0	0	0	6	0	0	105	0	0	111
1999-00	0	0	0	0	0	0	7	27	0	526	0	0	560

TOTAL HOP IMPORTS

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Gemany	NZ	Poland	U.K.	Yugo	Other	Total
1990-91	646	95	769	5,355	2,366	441	10,264	49	520	142	287	40	20,974
1991-92	734	84	358	4,533	4,574	586	6,792	174	871	62	178	0	18,946
1992-93	236	0	490	1,102	1,817	567	3,794	340	522	286	110	0	9,264
1993-94	265	0	628	0	1,984	1,082	7,888	450	602	282	0	5	13,186
1994-95	284	0	536	42	1,901	1,224	7,579	410	240	516	13	22	12,767
1995-96	328	0	234	42	293	1,345	9,440	503	237	619	0	86	13,127
1996-97	375	0	185	0	408	1,378	9,116	562	97	635	0	150	12,906
1997-98	187	0	203	0	269	1,283	7,879	516	2	531	0	99	10,970
1998-99	287	44	0	0	174	1,402	7,821	306	0	363	0	25	10,422
1999-00	222	0	2	0	665	1,774	7,442	638	20	837	0	11	11,614

SOURCE: USDA Hop Market News.

1/ Hop cone figures for Germany Australia, France, NZ, & UK include ground or powdered hop cones/lupulin

WORLD'S 35 LARGEST BREWERS

	BREWERY GROUP NAME & LOCATION	1999 MIL HL	WORLD MARKET SHARE	PERCENTAGE ADDED UP
1	ANHEUSER-BUSCH United States	113.8	8.46%	8.46%
2	INTERBREW Group Belgium	75.2	5.59%	14.05%
3	HEINEKEN Group The Netherlands	67.7	5.03%	19.08%
4	AMBEV Brazil	60.8	4.52%	23.60%
5	SAB Group South Africa	56.4	4.19%	27.79%
6	CARLSBERG Group Denmark	52.6	3.91%	31.70%
7	PHILIP MORRIS United States	50.8	3.78%	35.47%
8	SCOTTISH COURAGE United Kingdom	44.4	3.30%	38.77%
9	MODELO Mexico	34.4	2.56%	41.33%
10	KIRIN Japan	29.4	2.19%	43.52%
11	COORS United States	26.8	1.99%	45.51%
12	ASAHI Japan	25.1	1.87%	47.37%
13	FEMSA (Cuauhtemoc) Mexico	23.6	1.75%	49.13%
14	DIAGEO/GUINNESS UK / Ireland	21.0	1.56%	50.69%
15	SANTO DOMINGO GROUP Columbia	21.0	1.56%	52.25%
16	POLAR GROUP Venezuela	14.1	1.05%	53.30%
17	KAISER Brazil	13.0	0.97%	54.26%
18	HOLSTEN GRUPPE Germany	11.8	0.88%	55.14%
19	FOSTER'S BREWING GROUP Australia	11.7	0.87%	56.01%
20	MOLSON Canada	11.7	0.87%	56.88%
21	QUILMES GROUP Argentina	11.7	0.87%	57.75%
22	SAPPORO Japan	11.1	0.82%	58.57%
23	SAN MIGUEL Philippines	10.4	0.77%	59.35%
24	LION NATHAN New Zealand	10.2	0.76%	60.10%
25	SCHINCARIOL Brazil	10.0	0.74%	60.85%
26	TSINGTAO China	10.0	0.74%	61.59%
27	BINDING GRUPPE Germany	9.9	0.74%	62.33%
28	BRAU UNION Austria	9.3	0.69%	63.02%
29	HITE (formerly CHOSUN) Korea	9.0	0.67%	63.69%
30	BGI/CASTEL GROUP France	8.0	0.59%	64.28%
31	YANJING BREWERY China	7.5	0.56%	64.84%
32	SUNTORY Japan	6.6	0.49%	65.33%
33	WARSTEINER Germany	6.4	0.48%	65.80%
34	CHANG Thailand	6.1	0.45%	66.26%
35	EFES GROUP Turkey	5.6	0.42%	66.67%

SOURCE: Joh. Barth & Sohn GmbH & Co. KG.

WORLD BEER PRODUCTION 1990 & 1995 – 1998 (MILLION HL)

	1990	1995	1996	1997	1998	1999	2000*
Germany	120	117	114.2	114.8	108.3	112.8	113
Great Britain	59.6	58.8	58.4	59.1	55.7	57.9	58.2
Russia	0	17.7	20.6	25.2	38.9	45.9	53
Spain	27.3	25.3	24.7	24.9	24.7	25.9	26.6
Netherlands	20	23.1	23.5	24.7	24.5	24.5	25
France	21.4	18.3	20.4	19.5	19.4	19.8	20
Poland	12.2	15.1	16.5	18.8	22	22.5	22.5
Czech Republic	0	17.8	18.2	18.6	18.4	17.9	18
Belgium	14.1	14.5	14.2	14.2	14.2	14.2	14.2
Italy	11.1	11.9	11.1	11.5	12.5	12.1	12.1
Austria	9.6	9.7	9.5	9.4	8.4	8.9	8.9
Denmark	8.5	10.1	9.6	9.2	7.5	8	8
Europe Total	455.1	431.1	430.2	440.1	446	469.4	483.5
USA	238.9	233.7	236	236.4	238	236.5	237
Brazil	58	84	88.5	88.2	89.2	88.6	89.6
Mexico	39.7	44.5	47.2	51.9	56.9	57.3	58.1
Canada	22.6	22.8	22.5	22.4	22.81	22.9	22.9
Colombia	17.5	17.8	18.5	20	18.4	16.5	17
Venezuela	11	15.9	15	17.2	18.1	17.1	17.3
Argentina	6.9	10.4	11.5	12.1	12	13	13.2
America Total	422	459.2	469.9	478.8	482.4	482.2	486.4
China	70	154.6	163.2	170	180	180	185
Japan	65.6	67.2	68.7	67.7	71.5	71.5	71.2
South Korea	12.7	17.7	16.8	16.7	13.8	13.8	16.7
Philippines	15	13.9	13.2	13.5	12.5	12.4	12.4
Thailand		6.6	7.8	8.4	9.3	9.1	10.7
Asia Total	184.4	281.7	290.3	297.3	303.6	309.8	321.2
South Africa	22.5	24.5	24.8	25	25.7	25.7	25.2
Australia	19.6	17.8	17.4	17.3	17.8	17.6	17.6
Nigeria	8	4.5	4.2	4.3	1.1	1.1	1.5
New Zealand	3.9	3.5	3.4	3.2	4.2	3.2	3
WORLD TOTALS:	1.141.70	1.248.50	1268.7	1.170.70	1.324.00	1.344.60	1.374.30

SOURCE: Barth & Steiner Reports. Prepared by HGA

*Estimate

TEN LARGEST BEER PRODUCING COUNTRIES

COUNTRY	1999 BEER PRODUCTION (IN 000 BARRELS)	MARKET SHARE OF THE TWO LARGEST BREWERIES
United States	6,248,330	70 %
China	4,887,700	12 %
Germany	2,980,176	14 %
Brazil	2,124,194	87 %
Japan	1,889,294	77 %
The United Kingdom	1,528,503	60 %
Mexico	1,512,704	100 %
Russia	1,141,344	45 %
Spain	683,010	40 %
South Africa	678,994	99 %

SOURCE: Joh. Barth & Sohn GmbH & Co. KG.

THANK YOU

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