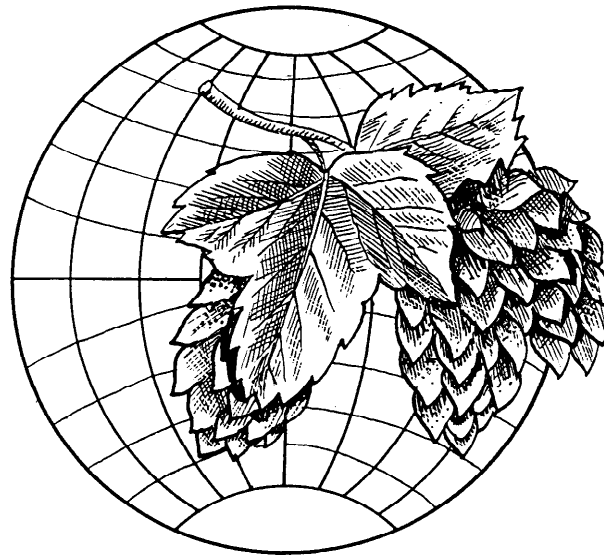


INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

NUREMBERG, GERMANY

NOVEMBER, 2016



International Hop Growers' Convention

IHGC - Economic Commission Summary Reports

Nuremberg, Germany - November, 7, 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 | Aroma | | Alpha | Hop area ¹ | New | Total | Aroma | Alpha | Total | MT | | |
| Australia [°] | 88 | 400 | 488 | 0 | 488 | 200 | 1 001 | 1 201 | 150 | 100 | 445 | 545 | 57 | 545 | 205 | 900 | 1 105 | 130 | | |
| Austria | 187 | 58 | 245 | 4 | 249 | 219 | 79 | 298 | 20 | 187 | 58 | 245 | 5 | 250 | 366 | 114 | 480 | 38 | | |
| Belgium | 82 | 66 | 148 | 0 | 148 | 82 | 105 | 187 | 15 | 89 | 60 | 149 | 7 | 149 | 111 | 98 | 209 | 17 | | |
| China [°] | 200 | 2 070 | 2 370 | 0 | 2 370 | 300 | 5 000 | 5 300 | 400 | 200 | 1 800 | 2 000 | 0 | 2 000 | 300 | 4 200 | 4 500 | 300 | | |
| Czech Republic | 4 149 | 43 | 4 192 | 430 | 4 622 | 4 764 | 79 | 4 843 | 160 | 4 381 | 46 | 4 427 | 348 | 4 775 | 7 010 | 90 | 7 100 | 305 | | |
| France | 364 | 49 | 413 | 27 | 440 | 491 | 64 | 555 | 25 | 381 | 33 | 414 | 45 | 459 | 700 | 72 | 772 | 27 | | |
| Germany | 9 675 | 7 019 | 16 694 | 1 153 | 17 847 | 13 790 | 14 547 | 28 337 | 2 525 | 10 063 | 7 254 | 17 317 | 1 281 | 18 598 | 22 200 | 20 500 | 42 700 | 4 650 | | |
| New Zealand [°] | 329 | 60 | 389 | 0 | 389 | 600 | 139 | 739 | 70 | 355 | 57 | 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 | 90 | 1 534 | 991 | 1 566 | 2 557 | 225 | | |
| Romania | 63 | 187 | 250 | 10 | 260 | 57 | 138 | 195 | 20 | 68 | 192 | 260 | 10 | 270 | 73 | 179 | 177 | 18 | | |
| 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 | 151 | 0 | 151 | 8 | | |
| Slovenia | 1 203 | 25 | 1 228 | 175 | 1 403 | 1 637 | 40 | 1 677 | 120 | 1 312 | 23 | 1 335 | 149 | 1 484 | 2 400 | 76 | 2 476 | 135 | | |
| South Africa [°] | 0 | 420 | 420 | 0 | 420 | 0 | 820 | 820 | 108 | 0 | 420 | 420 | 0 | 420 | 0 | 820 | 820 | 108 | | |
| Spain | 0 | 530 | 530 | 0 | 530 | 0 | 1 115 | 1 115 | 124 | 0 | 536 | 536 | 6 | 536 | 0 | 940 | 940 | 108 | | |
| 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 | 17 401 | 4 039 | 21 440 | 3 133 | 21 440 | 30 066 | 10 130 | 40 196 | 4 097 | | |
| IHGC | 31 816 | 16 728 | 48 644 | 4 842 | 50 555 | 45 510 | 40 673 | 86 183 | 7 907 | 36 405 | 16 145 | 52 550 | 5 168 | 54 510 | 66 802 | 40 476 | 107 203 | 10 391 | | |

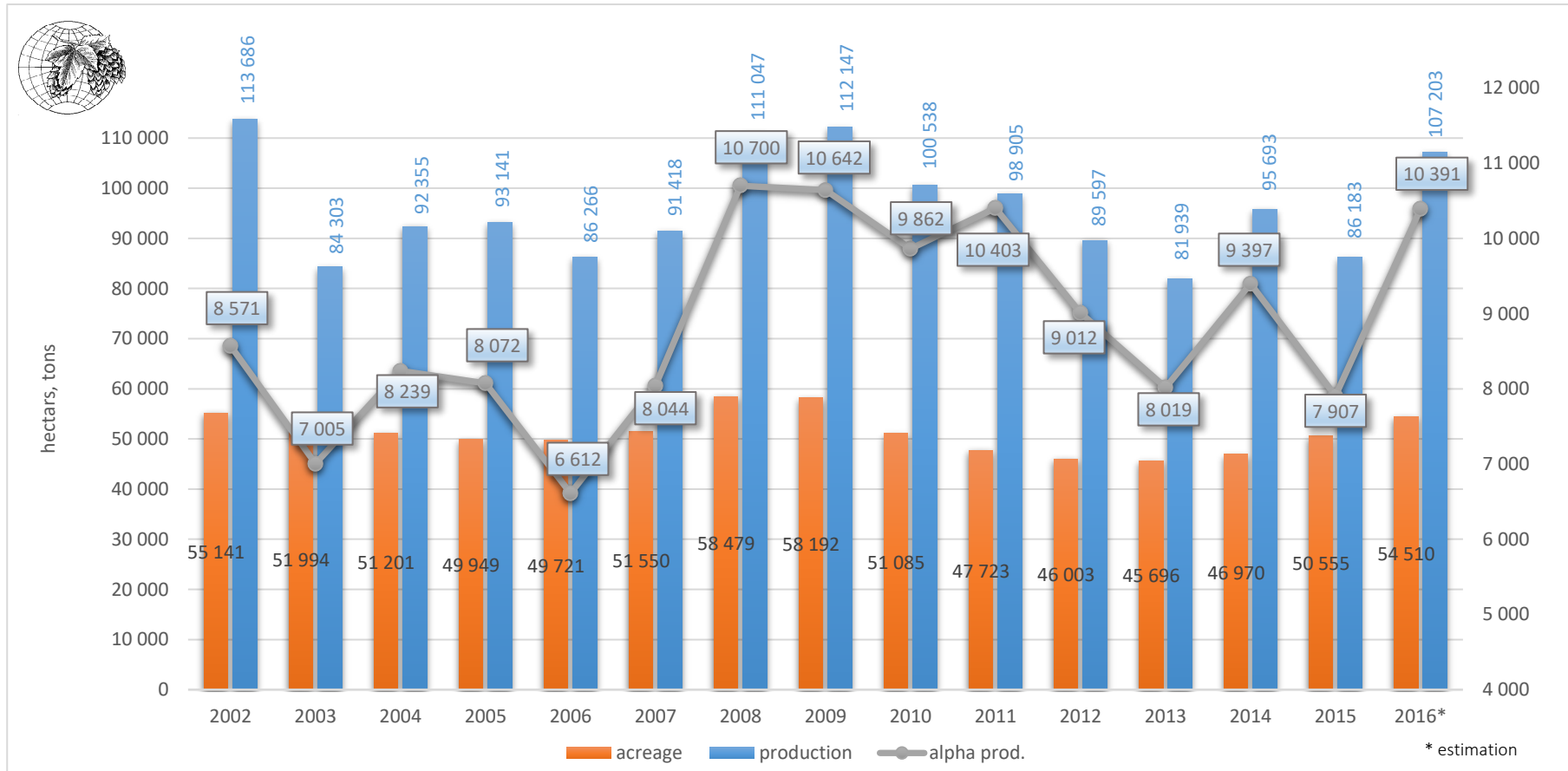
[°] Since no country updates were available, figures from Freising 2016 were used.

¹ Acreage without new hop areas

* IHGC estimation

Difference Σ 2016-2015 4 589 -583 3 906 326 **3 955** 21 292 -197 **21 020** **2 484**

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



International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

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 | 21,6 | 5,9 | 11,1 | 105,4 |
| Alpha | 9,5 | 12,0 | 16,5 | 14,5 | 7,1 | 74,4 |
| Total | 20,0 | | 38,1 | | | |

| 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 | 441 | 410 | 350 | 320 | 320 | 20 |
| % Crop / Year N | 98 | 85 | 78 | 70 | 70 | 5 |

| 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 | 0 | | | |
| Alpha Hops | 3,9 | 0 | | | |
| Average Price | | | | | |
| Contract Prices | | | | | |
| Aroma Hops | 6,5 | 6,5 | 7,3 | 12,3 | Erzeugerpreis / kg RH |
| Alpha Hops | 7,2 | 7,2 | 7,7 | 6,9 | Erzeugerpreis / kg RH |
| Average Price | | | | | |
| Average Prices | | | | | |
| Aroma Hops | | | | | |
| Alpha Hops | | | | | |
| AVERAGE | | | | | |

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: 02.11.2016

Member Organization:

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

Country:
BELGIUM

| Hop Area (Ha = Hectares) | Year N-1 2015 | Year N 2016 <i>(estimate)</i> | 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 <i>(estimate)</i> |
|----------------------|------------------|----------------------------------|
| Aroma | 0 | 7 |
| Alpha | 0 | 0 |
| Total | 0 | 7 |

| TOTAL Hop Area (Ha) | Year N-1 2015 | Year N 2016 <i>(estimate)</i> | Difference N - (N-1) | Difference % |
|------------------------|------------------|----------------------------------|-------------------------|-----------------|
| Aroma | 82 | 89 | 7 | |
| Alpha | 66 | 60 | -6 | |
| Total | 148 | 149 | 1 | |

| Production MT=Metric Tons | Year N-1 2015 | Year N 2016 <i>(estimate)</i> | Difference N - (N-1) | Difference % |
|------------------------------|------------------|----------------------------------|-------------------------|-----------------|
| Aroma | 81,86 | 111 | 29 | |
| Alpha | 104,78 | 98 | -7 | |
| Total | 186,64 | 209 | 22 | |

| Yield MT/Ha | Year N-1 2015 | Year N 2016 <i>(estimate)</i> | Difference % |
|----------------|------------------|----------------------------------|-----------------|
| Aroma | 1,0 | 1,3 | |
| Alpha | 1,6 | 1,6 | |
| 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 | 24,7 | 32 | | | | |
| Challenger | 18,8 | 19,7 | | | | |
| Cascade | 6,7 | 8,2 | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Alpha | | | | | | |
| | | | | | | |
| Magnum | 20,4 | 17,8 | | | | |
| Target | 36,1 | 32,05 | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

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 | 80% | 60% | 60% | 40% | 40% | 40% |

| 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 | | | 7,75 | | |
| Alpha Hops | | | 4,5 | | |
| AVERAGE | | | | | |

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

At the request of several Belgian breweries, some old Belgian varieties grown and planted back.
The rainfall at the end of May and the first half of June had little or no impact on the yield pro hectare
The increased demand for aroma hops by the Belgian breweries is stil topical

Belgium, Date: 04/

Member Organization(s): Joris Cambie

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

| |
|-----------------------------------|
| 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 | 152,0 | | 295,0 | | 143,0 | 94,1 |
| Alpha | 8,0 | | 10,0 | | 2,0 | 25,0 |
| Total | 160,0 | | 305,0 | | 145,0 | 90,6 |

| 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 (M1) : 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 | | 6,8 | 7,3 | | farmer price |
| Alpha Hops | | 4,5 | 5 | | farmer price |
| Average Price | | | | | |
| Average Prices | | | | | |
| Aroma Hops | | | | | |
| Alpha Hops | | | | | |
| AVERAGE | | | | | |

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
01.10.2016

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

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

Country:

France

| Hop Area (Ha = Hectares) | Year N-1 2015 | Year N 2016 | Difference N - (N-1) | Difference % |
|-----------------------------|------------------|-------------|-------------------------|-----------------|
| Aroma | 364 | 381 | 17 | 104,7% |
| Alpha | 49 | 33,4 | -16 | 68,2% |
| Total | 413 | 414 | 1 | 100,2% |

| New Hop Area (Ha) | Year N-1 2015 | Year N 2016 |
|----------------------|------------------|-------------|
| Aroma | 27 | 42,4 |
| Alpha | - | 2,6 |
| Total | 27 | 45 |

| TOTAL Hop Area (Ha) | Year N-1 2015 | Year N 2016 | Difference N - (N-1) | Difference % |
|------------------------|------------------|-------------|-------------------------|-----------------|
| Aroma | 403 | 423,4 | 20 | 105,1% |
| Alpha | 37 | 36 | -1 | 97,3% |
| Total | 440 | 459 | 19 | 104,3% |

| Production MT=Metric Tons | Year N-1 2015 | Year N 2016 0 | Difference N - (N-1) | Difference % |
|------------------------------|------------------|------------------|-------------------------|-----------------|
| Aroma | 491 | 700 | 209 | 142,6% |
| Alpha | 64 | 72 | 8 | 112,5% |
| Total | 555 | 772 | 217 | 139,1% |

| Yield MT/Ha | Year N-1 2015 | Year N 2016 0 | Difference % |
|----------------|------------------|------------------|-----------------|
| Aroma | 1,2 | 1,8 | 1,5 |
| Alpha | 1,7 | 2,2 | 1,3 |
| Total | 1,3 | 1,9 | 1,5 |

| Main Varieties (Ha = Hectares) | Year N-1 Total Acreage | Year N Total Acreage | Difference | Year N-1 Alpha % | Year N Alpha % | Difference N-(N-1) |
|--------------------------------------|------------------------------|----------------------------|------------|------------------------|----------------------|-----------------------|
| Aroma | | | | | | |
| Strisselspalt | 180 | 187 | 7 | 1,20 | 2,00 | |
| Aramis | 46 | 48,5 | 2,5 | 5,10 | 5,80 | |
| Tradition | 32 | 31 | -1 | 3,50 | 4,80 | |
| Triskel | 21 | 22 | 1 | 2,20 | 3,50 | |
| Fuggle | 38 | 44,3 | 6,3 | 2,70 | 4,60 | |
| Golding | 37 | 44,6 | 7,6 | 1,50 | 3,50 | |
| Challenger | 6 | 5,7 | -0,3 | 6,35 | 6,30 | |
| Barbe-Rouge | 2 | 9,5 | 7,5 | 6,60 | 6,00 | |
| Mistral | 5 | 7 | 2 | 4,64 | 5,50 | |
| Alpha | | | | | | |
| Columbus | 9,3 | 5,6 | -3,7 | 8,40 | 10,00 | |
| Brewers Gold | 10,8 | 15 | 4,2 | 4,00 | 5,50 | |
| Nugget | 16 | 6,3 | -9,7 | 8,00 | 10,00 | |
| Magnum | 5 | 4,7 | -0,3 | 12,00 | 12,00 | |
| Target | 5 | 5,9 | 0,9 | 10,30 | 10,50 | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

International Hop Growers' Convention

IHGC-Economic Committee: July 2016 - Freising, Germany

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 |
| | | % | 0 | % | | % |
| Aroma | 17,2 | 3,2 | 20,2 | 2,9 | 3,0 | 1,2 |
| Alpha | 7,8 | 7,4 | 6,4 | 8,9 | -1,4 | 0,8 |
| Total | 25,0 | 3,9 | 26,6 | 3,1 | 1,6 | 1,1 |

| 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 | 95 | 90 | 80 | 70 | 50 |

| 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 | | | 9 | | |
| Alpha Hops | | | 7 | | |
| Average Price | | | | | |
| Contract Prices | | | | | |
| Aroma Hops | | | 7 | | |
| Alpha Hops | | | 5 | | |
| Average Price | | | | | |
| Average Prices | | | | | |
| Aroma Hops | | | | | |
| Alpha Hops | | | | | |
| AVERAGE | | | | | |

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
October 19, 2016

Member Organization(s):
AGPH
Francis Heitz

International Hop Growers' Convention

IHGC-Economic Commission: November 2016 - Nürnberg, Germany

Country:

Germany

| Hop area (ha) | Year N-1 2015 | Year N 2016 | Difference N - (N-1) | Difference % |
|-----------------|---------------|-------------|----------------------|--------------|
| Aroma | 9675 | 10063 | 388 | 4,0 |
| Alpha | 7019 | 7254 | 235 | 3,3 |
| Total | 16694 | 17317 | 623 | 3,7 |

| New Hop Area (ha) | Year N-1 2015 | Year N 2016 |
|---------------------|---------------|-------------|
| Aroma | 656 | 471 |
| Alpha | 497 | 810 |
| Total | 1153 | 1281 |

| TOTAL Hop area (ha) | Year N-1 2015 | Year N 2016 | Difference N - (N-1) | Difference % |
|-----------------------|---------------|-------------|----------------------|--------------|
| Aroma | 10331 | 10534 | 203 | 2,0 |
| Alpha | 7516 | 8064 | 548 | 7,3 |
| Total | 17847 | 18598 | 751 | 4,2 |

| Production MT | Year N-1 2015 | Year N 2016 estimate | Difference N - (N-1) | Difference % |
|---------------|---------------|----------------------|----------------------|--------------|
| Aroma | 13 790 | 22 200 | 8 410 | 61,0 |
| Alpha | 14 547 | 20 500 | 5 953 | 40,9 |
| Total | 28 337 | 42 700 | 14 363 | 50,7 |

| Yield MT/HA. | Year N-1 2015 | Year N 2016 estimate | Difference % |
|--------------|---------------|----------------------|--------------|
| Aroma | 1,3 | 2,1 | 57,9 |
| Alpha | 1,9 | 2,5 | 31,3 |
| Total | 1,6 | 2,3 | 44,6 |

| 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 | 3093 | -94 | 4,5 | 8,2 | 3,7 |
| Hall.Tradition | 2914 | 2827 | -87 | 4,7 | 6,4 | 1,7 |
| Hersbrucker | 954 | 943 | -11 | 2,3 | 2,8 | 0,5 |
| Hallertauer | 746 | 733 | -13 | 2,8 | 4,3 | 1,5 |
| Tettnanger | 744 | 732 | -12 | 2,1 | 3,8 | 1,7 |
| Spalter Select | 533 | 534 | 1 | 3,2 | 5,2 | 2 |
| Saphir | 423 | 450 | 27 | 2,5 | 4 | 1,5 |
| Spalter | 113 | 119 | 6 | 2,2 | 4,3 | 2,1 |
| Mand. Bavaria | 207 | 346 | 139 | | 8,7 | 8,7 |
| Alpha | | | | | | |
| Herkules | 4152 | 4884 | 732 | 15,1 | 17,3 | 2,2 |
| Hall. Magnum | 2353 | 2196 | -157 | 12,2 | 14,3 | 2,1 |
| Hall.Taurus | 465 | 357 | -108 | 12,9 | 17,6 | 4,7 |
| North. Brewer | 238 | 266 | 28 | 5,4 | 10,5 | 5,1 |
| Nugget | 162 | 152 | -10 | 9,2 | 12,9 | 3,7 |
| Polaris | 60 | 106 | 46 | | 21,3 | 21,3 |
| Hall. Merkur | 26 | 21 | -5 | | 13,4 | 13,4 |
| Brewers Gold | 17 | 17 | 0 | | 7,2 | 7,2 |
| Comet | 5 | 7 | 2 | | | 0 |

International Hop Growers' Convention

IHGC-Economic Commission: November 2016 - Nürnberg, Germany

| |
|----------------------------|
| 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 | 1350,0 | 6,1 | 807,0 | 2,1 |
| Alpha | 1982,0 | 13,6 | 3300,0 | 16,1 | 1318,0 | 2,5 |
| Total | 2 525 | 8,9 | 4650,0 | 10,9 | 2125,0 | 2,0 |

| 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 | 33479 | 34804 | 34195 | 30239 | 27825 | 15654 |
| % Crop / Year N | 78 | 82 | 80 | 71 | 65 | 37 |

| Unsold Hops (MT) : Crop Year (N-1) | 2015 | Aroma | Alpha | Total |
|------------------------------------|------|--------|--------|--------|
| Total Hop Production | | 13 790 | 14 547 | 28 337 |
| - Sold Production | | 13 790 | 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:

Germany

03.11.2016

Verband deutscher Hopfenpflanzer

gez. Brunner

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

Country:

Poland

| Hop Area (Ha = Hectares) | Year N-1 2015 | Year N 2016 (estimate) | Difference N - (N-1) | Difference % |
|-----------------------------|------------------|---------------------------|-------------------------|-----------------|
| Aroma | 573,79 | 619,43 | 46 | 8,0 |
| Alpha | 789,78 | 824,67 | 35 | 4,4 |
| Total | 1363,57 | 1444,1 | 81 | 5,9 |

| New Hop Area (Ha) | Year N-1 2015 | Year N 2016 (estimate) |
|----------------------|------------------|---------------------------|
| Aroma | 45,64 | 40 |
| Alpha | 34,89 | 50 |
| Total | 80,53 | 90 |

| TOTAL Hop Area (Ha) | Year N-1 2015 | Year N 2016 (estimate) | Difference N - (N-1) | Difference % |
|------------------------|------------------|---------------------------|-------------------------|-----------------|
| Aroma | 619,43 | 659,43 | 40 | 6,5 |
| Alpha | 824,67 | 874,67 | 50 | 6,1 |
| Total | 1444,1 | 1534,1 | 90 | 6,2 |

| Production MT=Metric Tons | Year N-1 2015 | Year N 2016 (estimate) | Difference N - (N-1) | Difference % |
|------------------------------|------------------|---------------------------|-------------------------|-----------------|
| Aroma | 826 | 991 | 165 | 20,0 |
| Alpha | 1 416 | 1 566 | 150 | 10,6 |
| Total | 2 242 | 2 557 | 315 | 14,0 |

| Yield MT/Ha | Year N-1 2015 | Year N 2016 (estimate) | Difference % |
|----------------|------------------|---------------------------|-----------------|
| Aroma | 1,4 | 1,6 | 14,0 |
| Alpha | 1,8 | 1,9 | 5,6 |
| Total | 1,6 | 1,8 | 12,5 |

| Main Varieties (Ha = Hectares) | Year N-1 Total Acreage | Year N Total Acreage | Difference | Year N-1 Alpha % | Year N Alpha % | Difference N-(N-1) |
|--------------------------------------|------------------------------|----------------------------|------------|------------------------|----------------------|-----------------------|
| Aroma | | | | | | |
| 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 | | | |
| lunga | 4,98 | 4,98 | 0 | | | |
| Klony hodowlane | 2,35 | 2,35 | 0 | | | |
| Taurus | 8,22 | 8,22 | 0 | | | |
| Magnat | 13,68 | 63,68 | 50 | | | |
| Oktawia | 0,56 | 0,56 | 0 | | | |
| | | | | | | |
| | | | | | | |

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

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 | 44,6 | 4,5 | 12,2 | 0,6 |
| Alpha | 148,0 | 10,5 | 180,1 | 11,5 | 32,1 | 1,1 |
| Total | 180,4 | 8,0 | 224,7 | 8,9 | 44,3 | 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 | | | | | | |

| 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 | 7 | | |
| Alpha Hops | 3,3 | 4,65 | 4,65 | | |
| Average Price | 3,69 | 5,83 | 5,83 | | |
| Contract Prices | | | | | |
| Aroma Hops | 3,36 | 4,47 | 4,18 | | |
| Alpha Hops | 2,93 | 3,54 | 3,49 | | |
| Average Price | 3,15 | 4 | 3,84 | | |
| Average Prices | | | | | |
| Aroma Hops | 3,72 | 5,73 | 5,59 | | |
| Alpha Hops | 3,12 | 4,1 | 4,07 | | |
| AVERAGE | 3,42 | 4,92 | 4,83 | | |

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Difference of hop prices between 2015 and 2016 is the result of change rate euro

Country, Date:
Poland, 03.11.2016

Member Organization(s):
Polish Hop Growers Association

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 – Nurnberg, Germany

| |
|----------------------------|
| 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 | 192 | 5 | 2,7 |
| Total | 250 | 260 | 10 | 4,0 |

| New Hop Area (Ha) | Year N-1 2015 | Year N 2016 (estimate) |
|----------------------|------------------|---------------------------|
| Aroma | 5 | 5 |
| Alpha | 5 | 5 |
| Total | 10 | 10 |

| TOTAL Hop Area (Ha) | Year N-1 2015 | Year N 2016 (estimate) | Difference N - (N-1) | Difference % |
|------------------------|------------------|---------------------------|-------------------------|-----------------|
| Aroma | 68 | 73 | 5 | 7,4 |
| Alpha | 192 | 197 | 5 | 2,6 |
| Total | 260 | 270 | 10 | 3,8 |

| Production MT=Metric Tons | Year N-1 2015 | Year N 2016 (estimate) | Difference N - (N-1) | Difference % |
|------------------------------|------------------|---------------------------|-------------------------|-----------------|
| Aroma | 57 | 55 | -2 | -3,5 |
| Alpha | 138 | 122 | -16 | -11,6 |
| Total | 195 | 177 | -18 | -9,2 |

| Yield MT/Ha | Year N-1 2015 | Year N 2016 (estimate) | Difference % |
|----------------|------------------|---------------------------|-----------------|
| Aroma | 0,90 | 0,81 | -10,6 |
| Alpha | 0,74 | 0,64 | -13,9 |
| Total | 0,78 | 0,68 | -12,7 |

| 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 | 8,7 | -0,5 |
| Huller Bitter | 30 | 28 | -2 | 7,8 | 7,6 | -0,2 |
| | 68 | 73 | 5 | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Alpha | | | | | | |
| Magnum | 93 | 98 | 5 | 12,2 | 13,0 | 0,8 |
| Merkur | 29 | 29 | 0 | 12,5 | 13,0 | 0,5 |
| Brewers Gold | 70 | 70 | 0 | 8,1 | 7,7 | -0,4 |
| | 192 | 197 | 5 | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 – Nurnberg, Germany

| |
|----------------------------|
| 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 | 4,5 | 8,1 | -0,6 | -12,2 |
| Alpha | 15,0 | 10,9 | 13,3 | 10,9 | -1,7 | -11,2 |
| Total | 20,1 | 10,3 | 17,8 | 10,1 | -2,3 | -11,4 |

| 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 | 200 | 270 | 290 | 290 | 300 | |
| % Crop / Year N | 98 | 66 | 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

In the 2016 June 15 we had a hailstrom damage 91 ha area.
The production are desceased with 20 -30 %.

Country, Date:

21-X-2016

Member Organization(s):

MORA ACATIU ERVIN

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

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 | 120,0 | | 135,0 | | | |

| 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 | 95 | 85 | 80 | 60 | 40 | 40 |

| 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 Styrian Goldings and new flavour varieties from Slovenia, such as Styrian Wolf and Styrian Cardinal.

Country, Date:
Slovenia, October 28, 2016

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

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

Country:

Spain

| 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 | 124,0 | | 108,0 | | | |
| Total | 124,0 | | 108,0 | | | |

| 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 | 1 100 | 1 100 | 1 100 | | | |
| % 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 | 3,72 | 3,54 | 4,5 | | |
| Aroma Hops | | | | | |
| Alpha Hops | | | | | |
| Average Price | | | | | |
| Average Prices | | | | | |
| Aroma Hops | | | | | |
| Alpha Hops | | | | | |
| AVERAGE | | | | | |

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

Country:

USA

| Hop Area (Ha = Hectares) | Year N-1 2015 | Year N 2016 (estimate) | Difference N - (N-1) | Difference % |
|-----------------------------|------------------|---------------------------|-------------------------|-----------------|
| Aroma | 13 653 | 17 401 | 3 748 | 27,5% |
| Alpha | 4 654 | 4 039 | -615 | -13,2% |
| Total | 18 307 | 21 440 | 3 133 | 17,1% |

| 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 | 17 401 | 3 748 | 27,5% |
| Alpha | 4 654 | 4 039 | -615 | -13,2% |
| Total | 18 307 | 21 440 | 3 133 | 17,1% |

Includes 849 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 | 30 066 | 9 066 | 43,2% |
| Alpha | 15 447 | 10 130 | -5 317 | -34,4% |
| Total | 36 447 | 40 196 | 3 749 | 10,3% |

| Yield MT/Ha | Year N-1 2015 | Year N 2016 (estimate) | Difference % | Pounds/Acre |
|----------------|------------------|---------------------------|-----------------|-------------|
| Aroma | 1,54 | 1,73 | | 1 541 |
| Alpha | 3,32 | 2,51 | | 2 238 |
| Total | 1,99 | 1,87 | | 1 673 |

| 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% | 9,1% | |
| Azacca™, ADHA-483 | 73 | 203 | 130 | | | |
| Cascade* | 2 800 | 3 283 | 483 | 2983 PNW+300 other* | | |
| Centennial* | 1 930 | 2 227 | 297 | 2027 PNW+200 other* | | |
| Citra®, HBC 394 | 1 169 | 1 793 | 624 | | | |
| Chinook | 700 | 996 | 296 | | | |
| El Dorado | 181 | 270 | 89 | | | |
| Jarrylo™, ADHA-881 | 49 | 51 | 2 | | | |
| Mosaic™, HBC 369 | 724 | 1 100 | 376 | | | |
| Pekko™, ADHA-871 | 8 | 44 | 36 | | | |
| Simcoe®, YCR 14 | 1 322 | 1 764 | 442 | | | |
| Willamette | 575 | 586 | 11 | | | |
| *Total other (non-PNW) acreage estimated at 849 ha. The 2 most prevalent varieties are Cascade and Centennial, so estimates are included to represent a contribution from those 26 additional states. | | | | | | |
| Alpha | | | | 14,2% | 13,2% | |
| Apollo™ | 402 | 301 | -101 | | | |
| Bravo™ | 295 | 219 | -76 | | | |
| CTZ | 2 160 | 1 821 | -339 | | | |
| Nugget | 662 | 648 | -14 | | | |
| Summit™ | 685 | 713 | 28 | | | |
| Super Galena™ | 206 | 180 | -26 | | | |

International Hop Growers' Convention

IHGC-Economic Committee: November 2016 - Nuremberg, Germany

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 | 4 097 | 10,2 | | |

| 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 | | | |
| | 7.28 Euro/kg | 8.69 Euro/kg | | | |

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate \$1 USD = 0.9 Euro (2 NOV 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

XI.16

Member Organization(s):
Hop Growers of America

Figure 2: Australia hop crops 2002 - 2016*

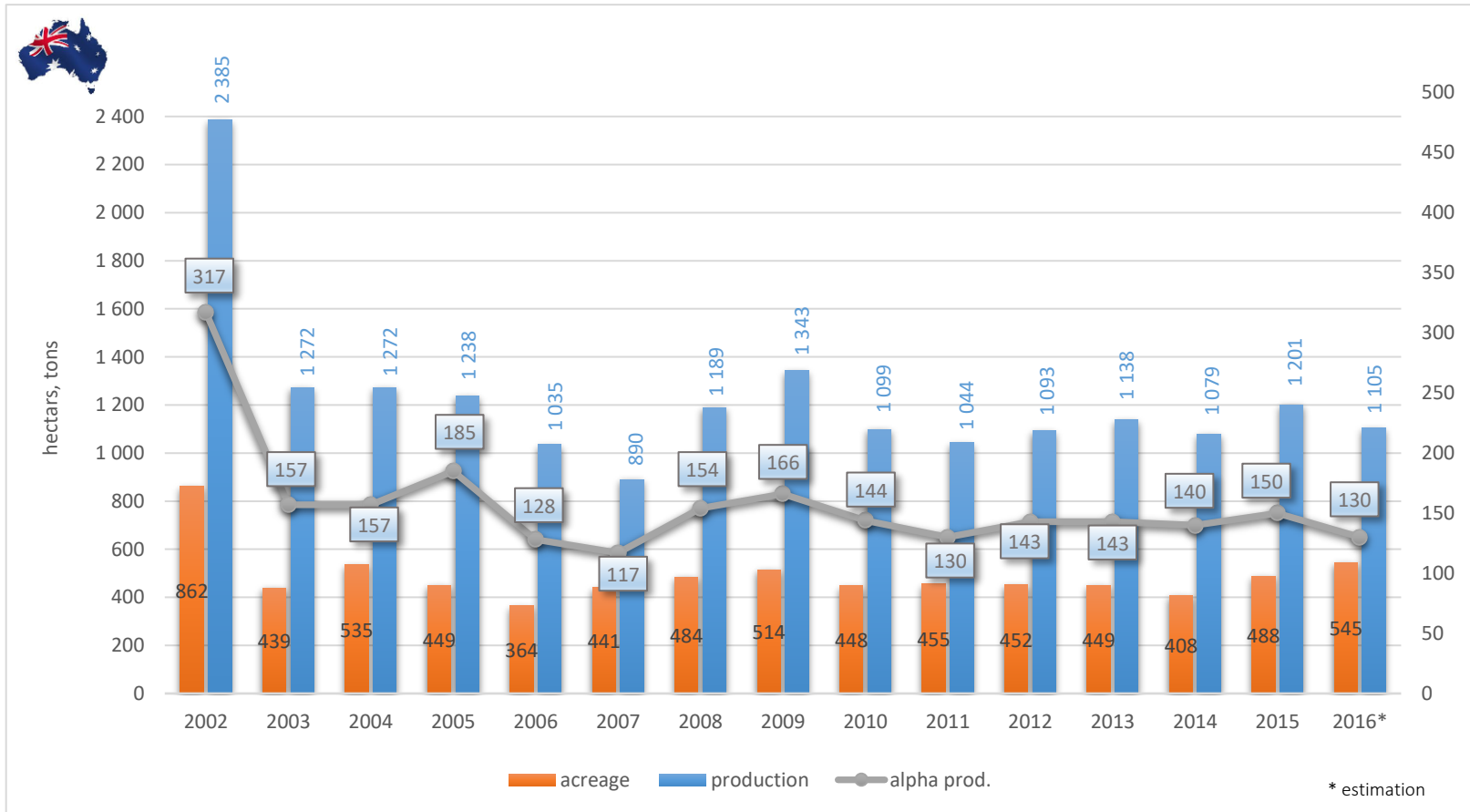


Figure 3: Austria hop crops 2002 - 2016*

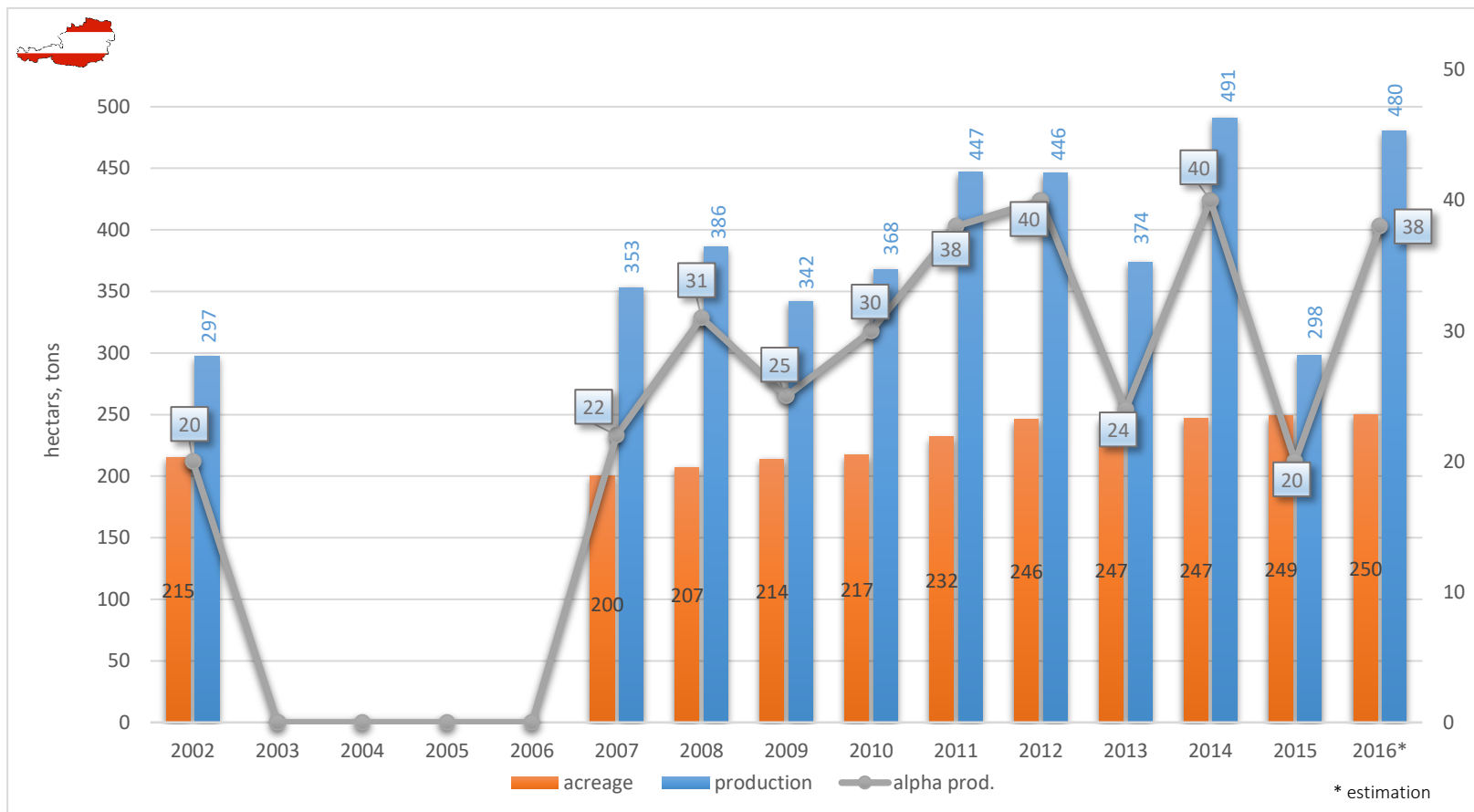


Figure 4: Belgium hop crops 2002 - 2016*

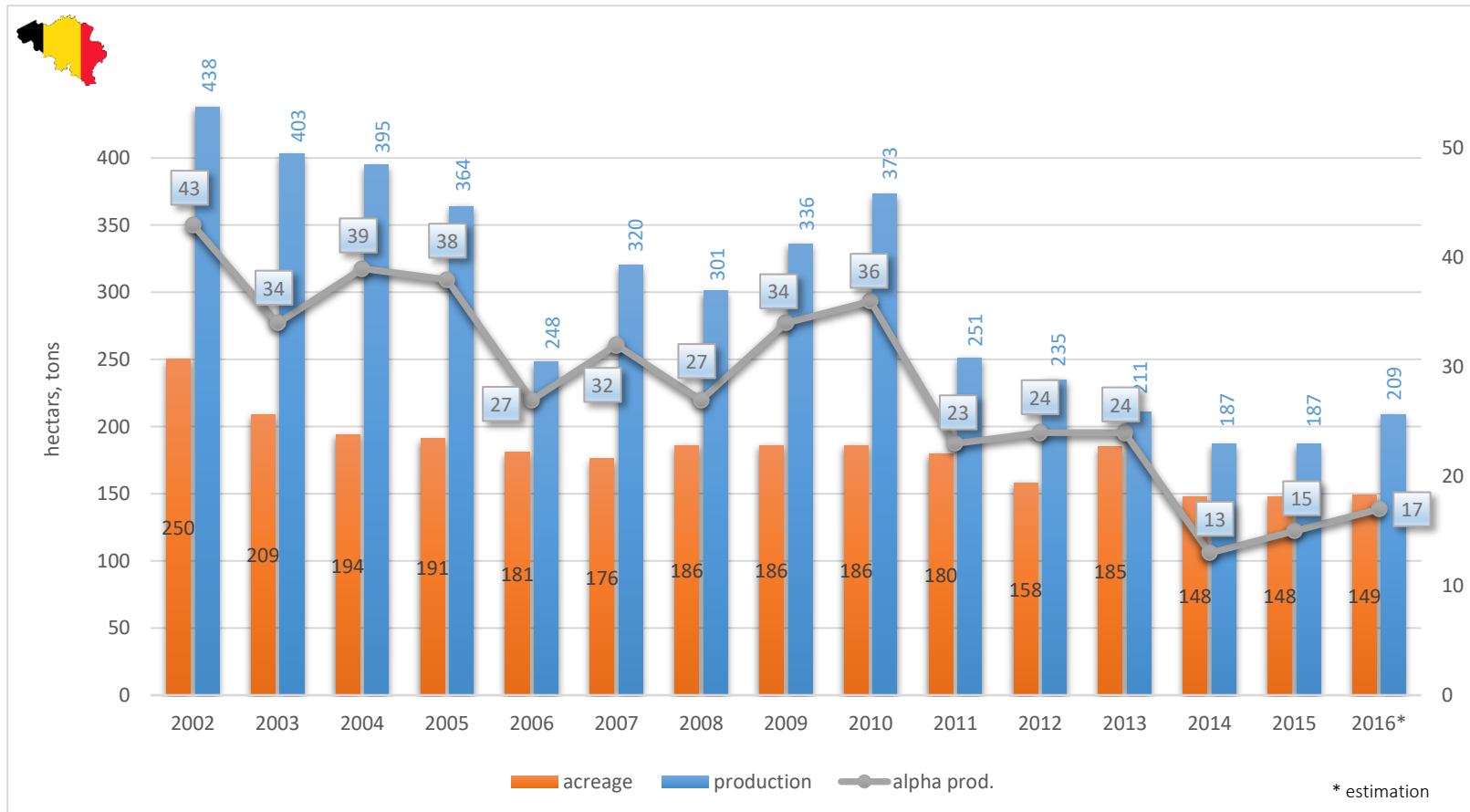


Figure 5: China hop crops 2002 - 2016*

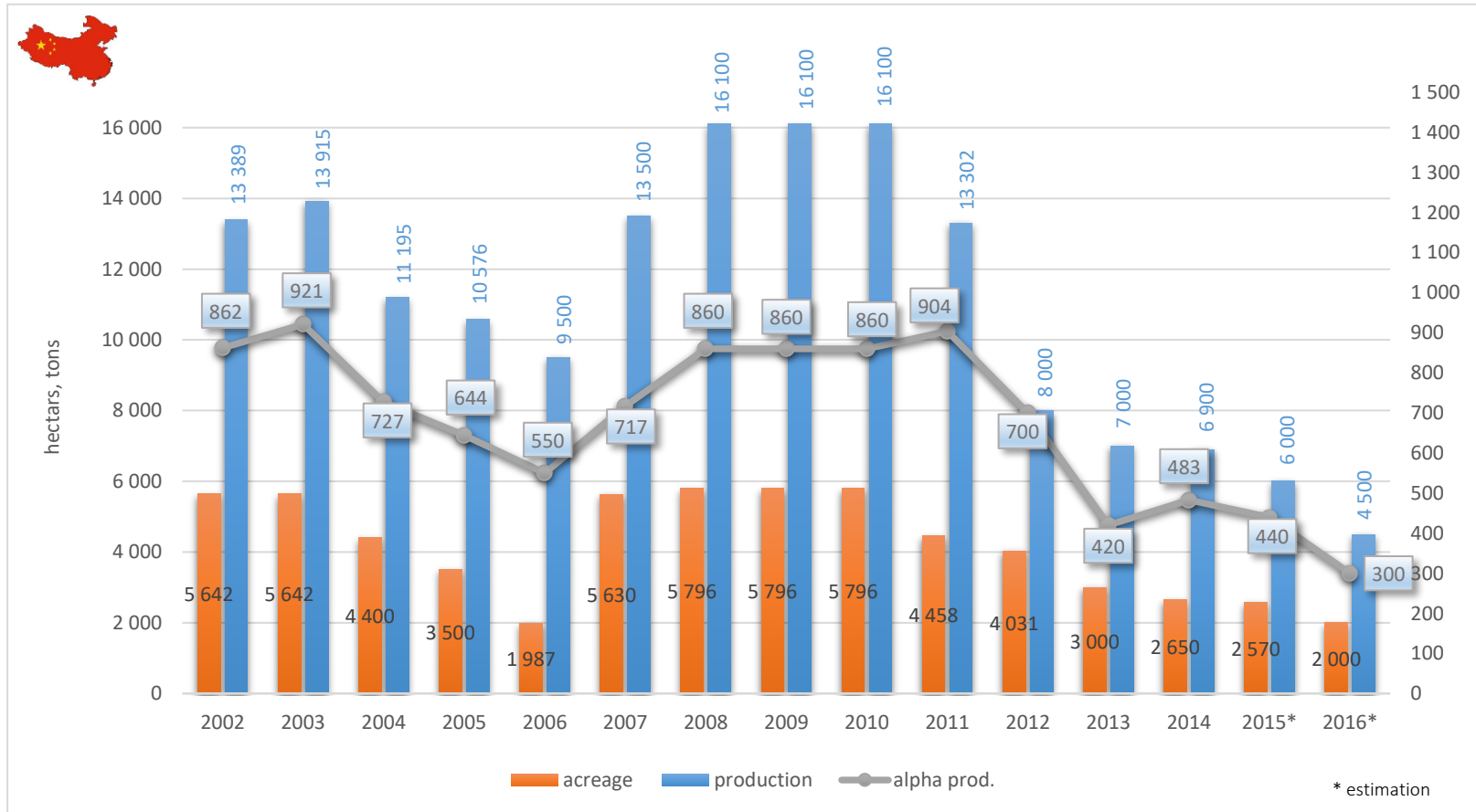


Figure 6: Czech Republic hop crops 2002 - 2016*

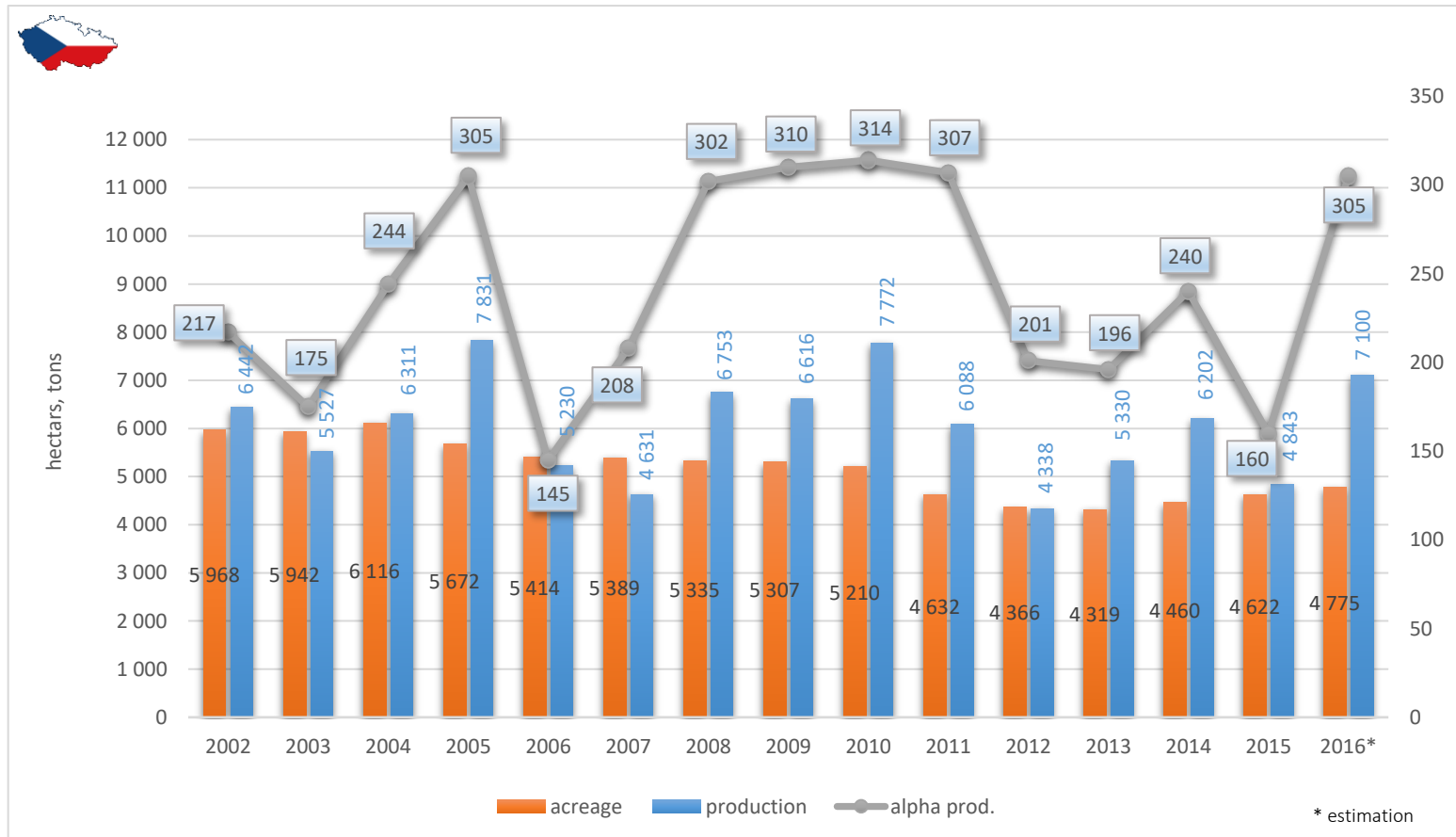


Figure 7: France hop crops 2002 - 2016*

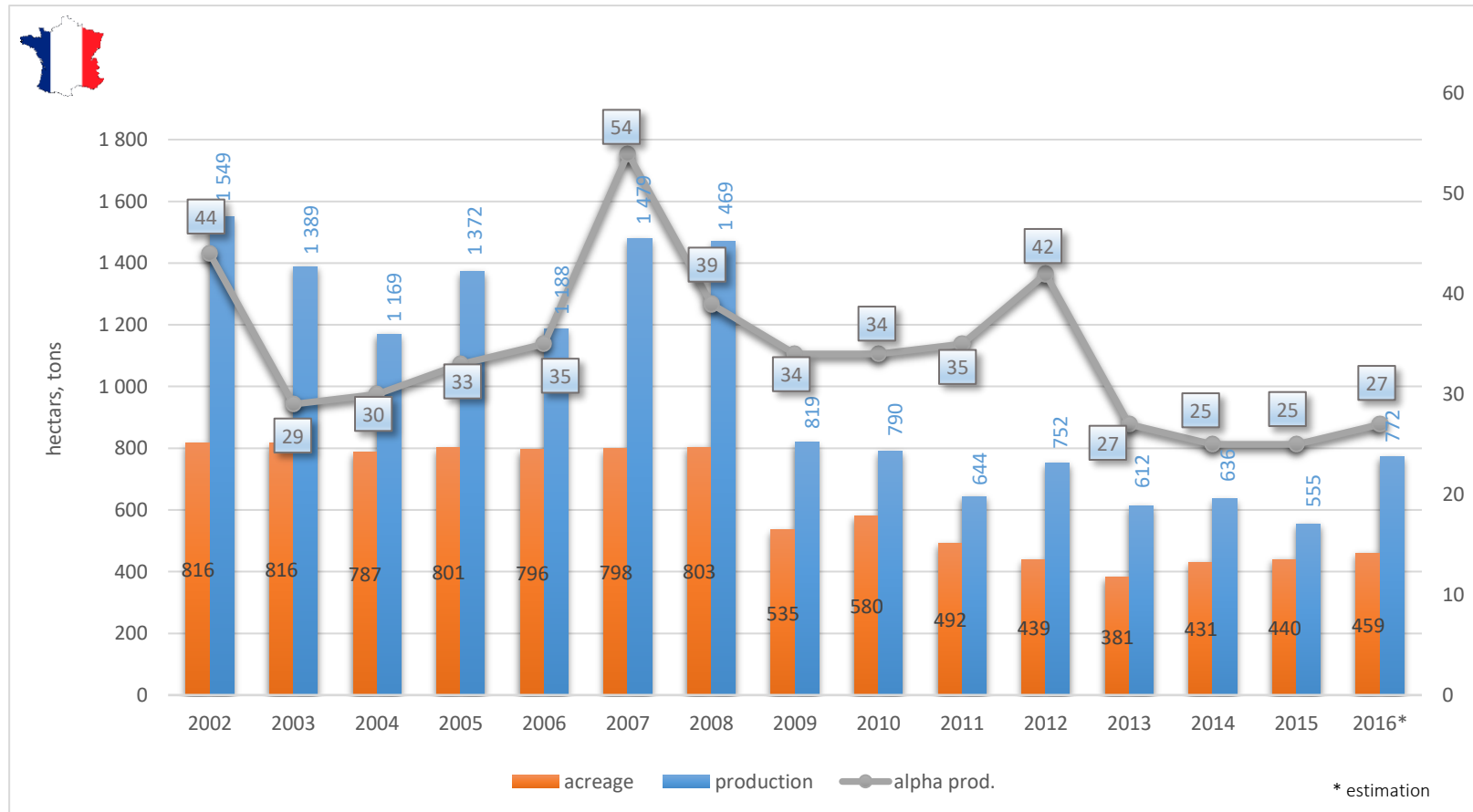


Figure 8: Germany hop crops 2002 - 2016*

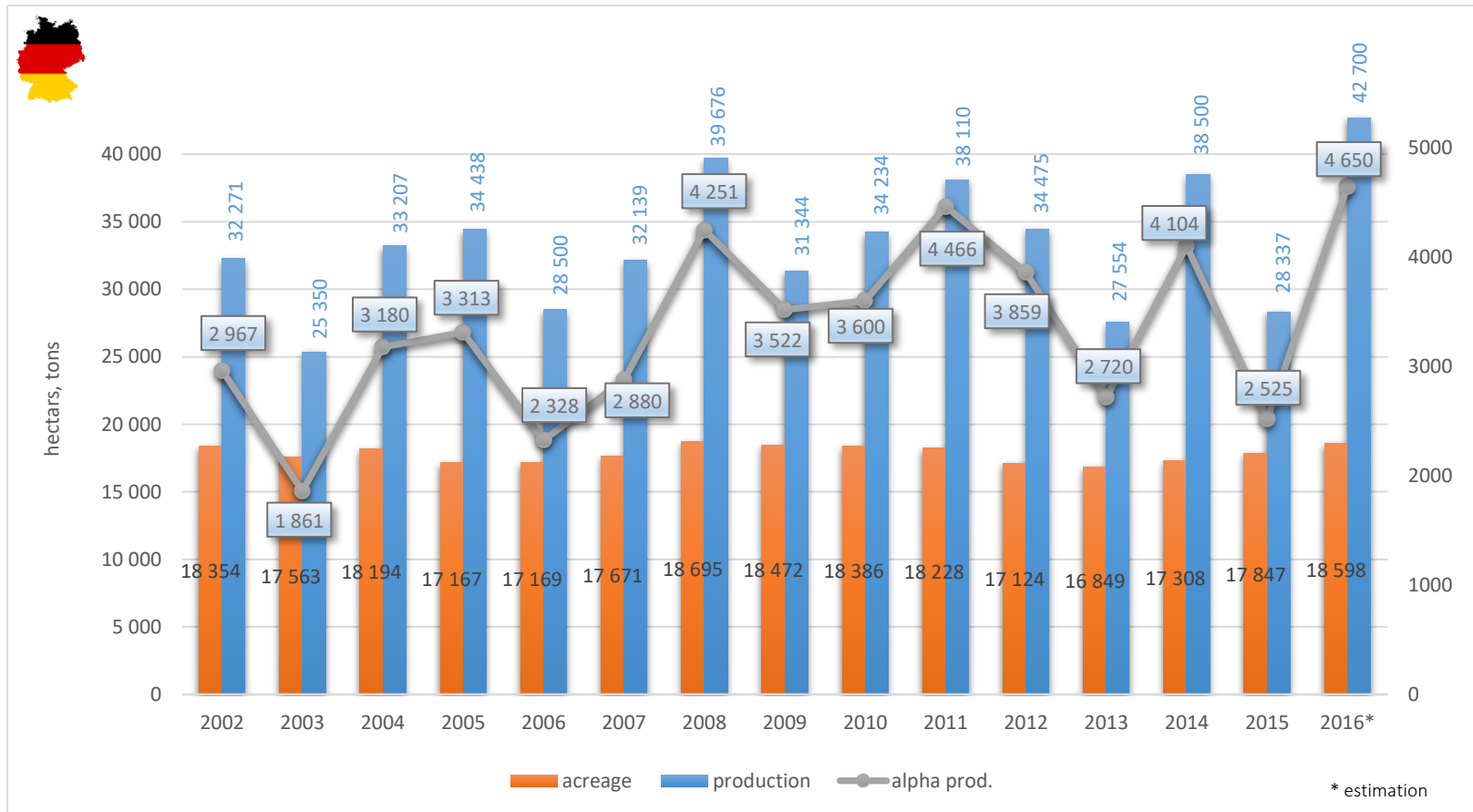


Figure 9: New Zealand hop crops 2002 - 2016

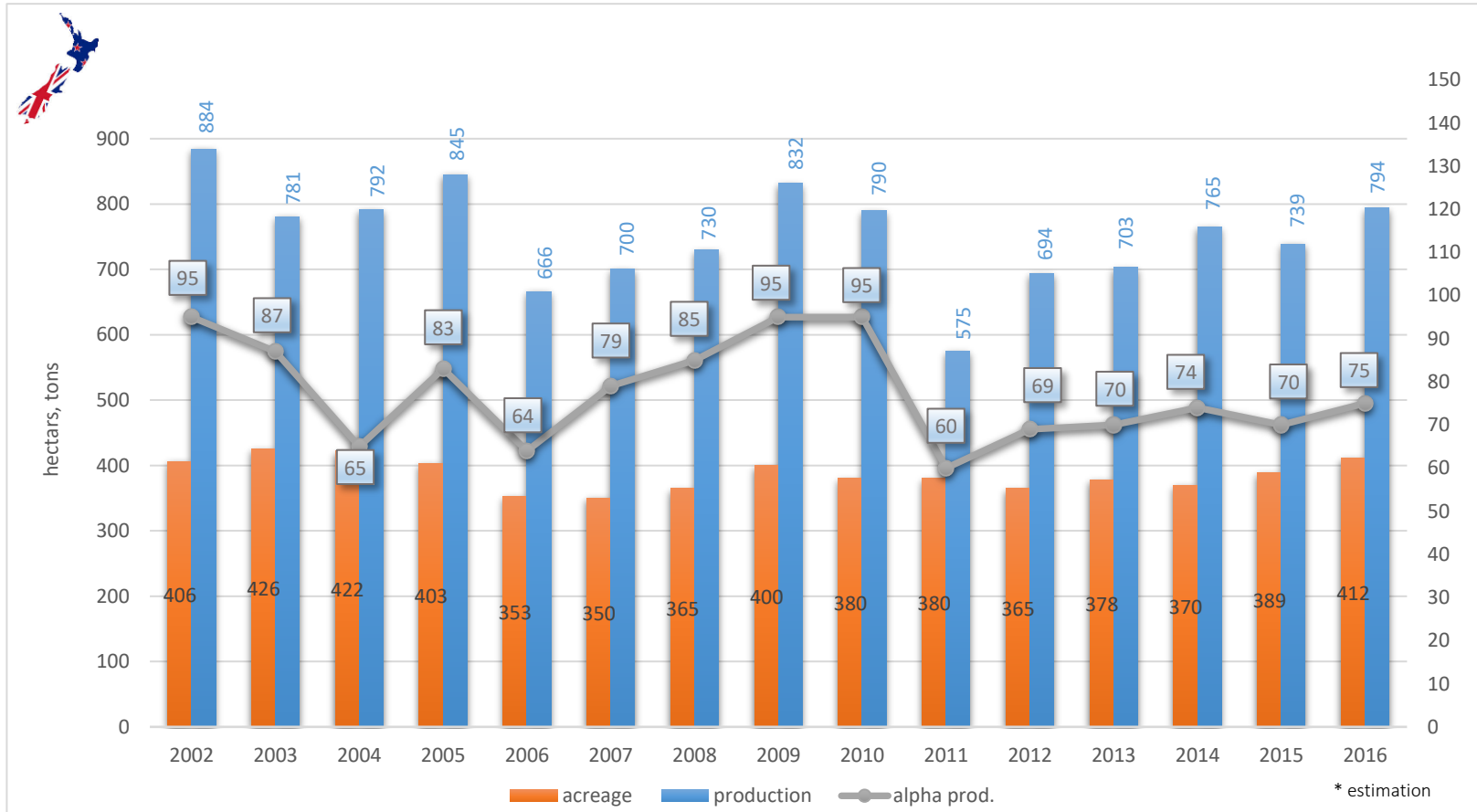


Figure 10: Poland hop crops 2002 - 2016*

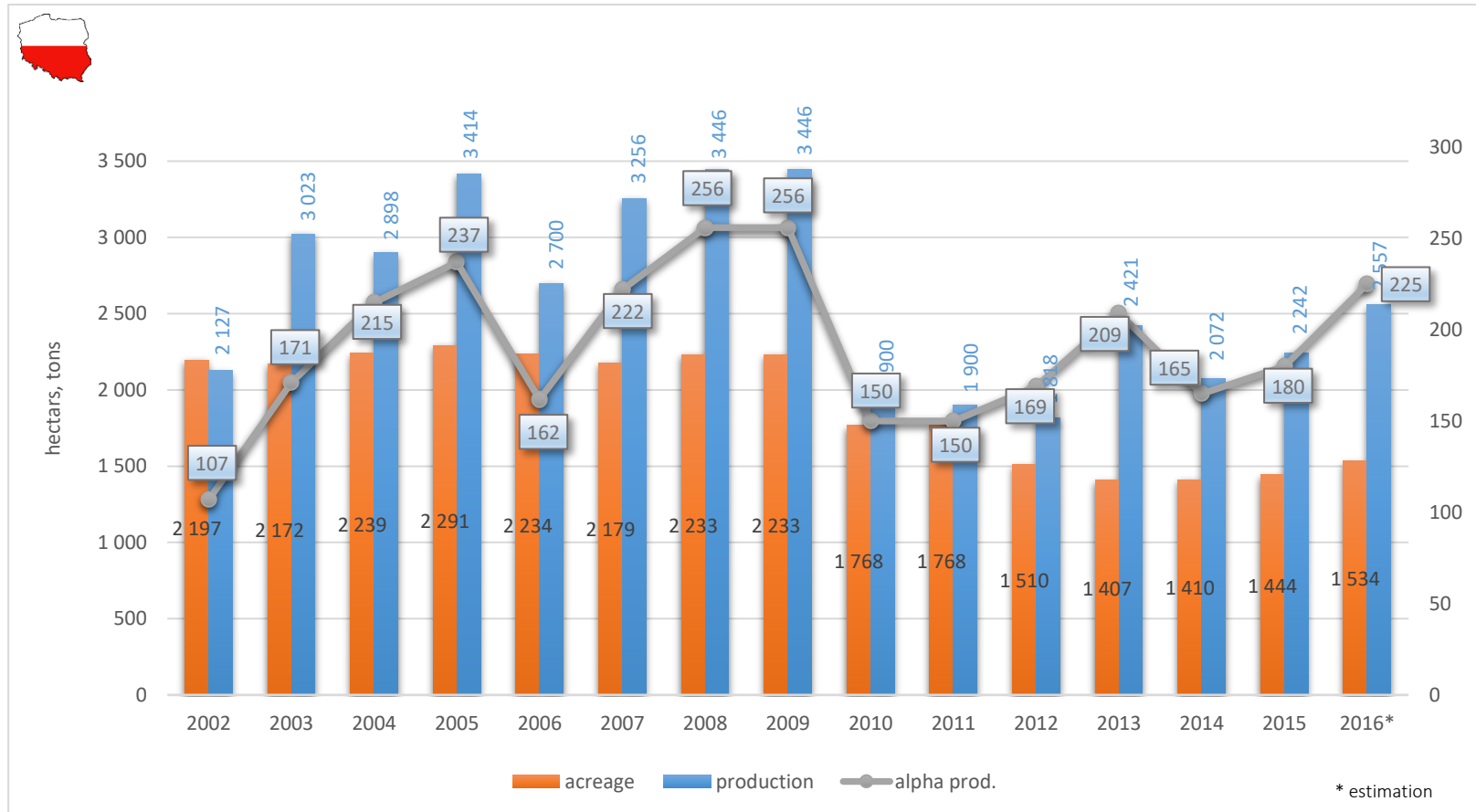


Figure 11: Romania hop crops 2002 - 2016*

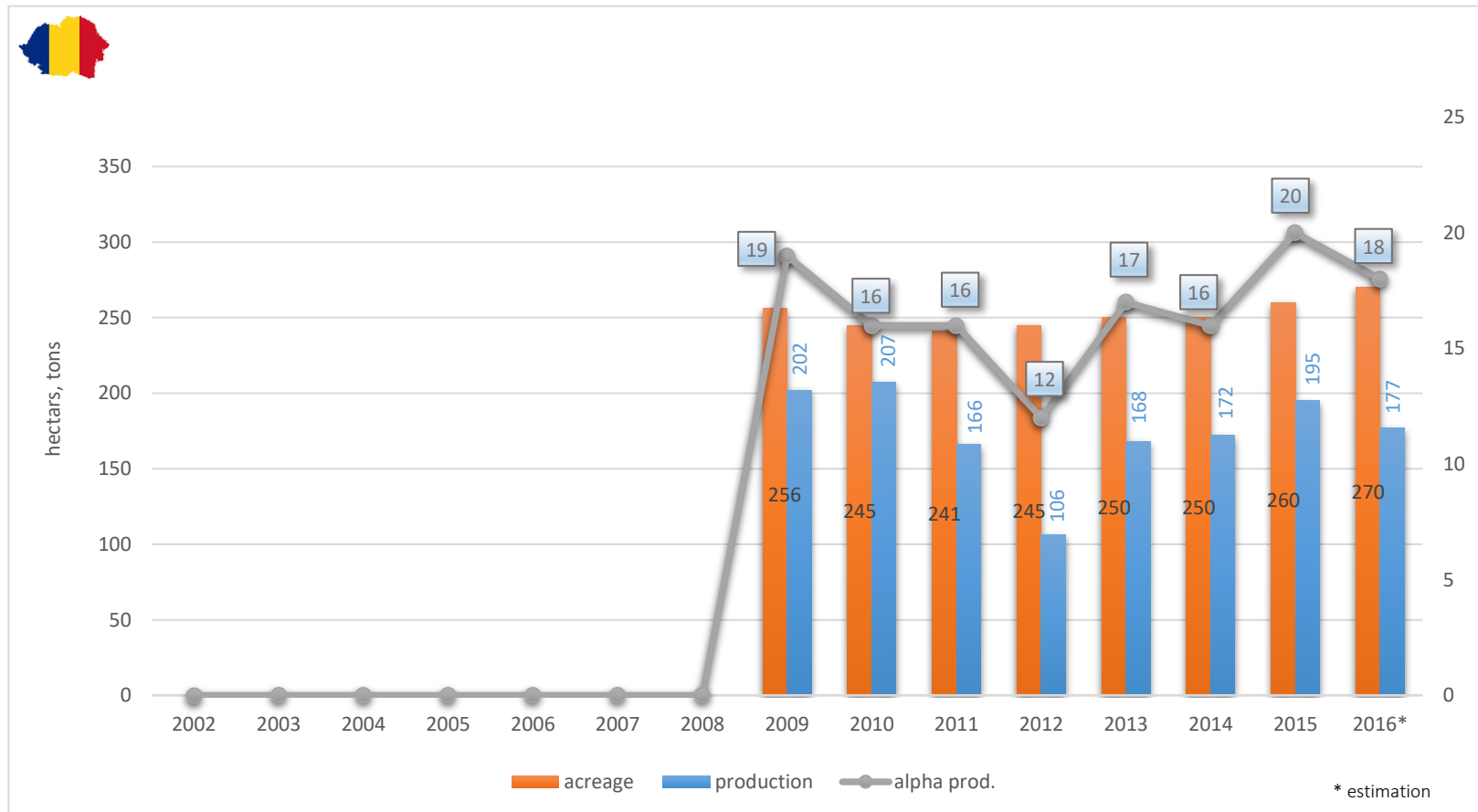


Figure 12: Slovakia hop crops 2002 - 2016*

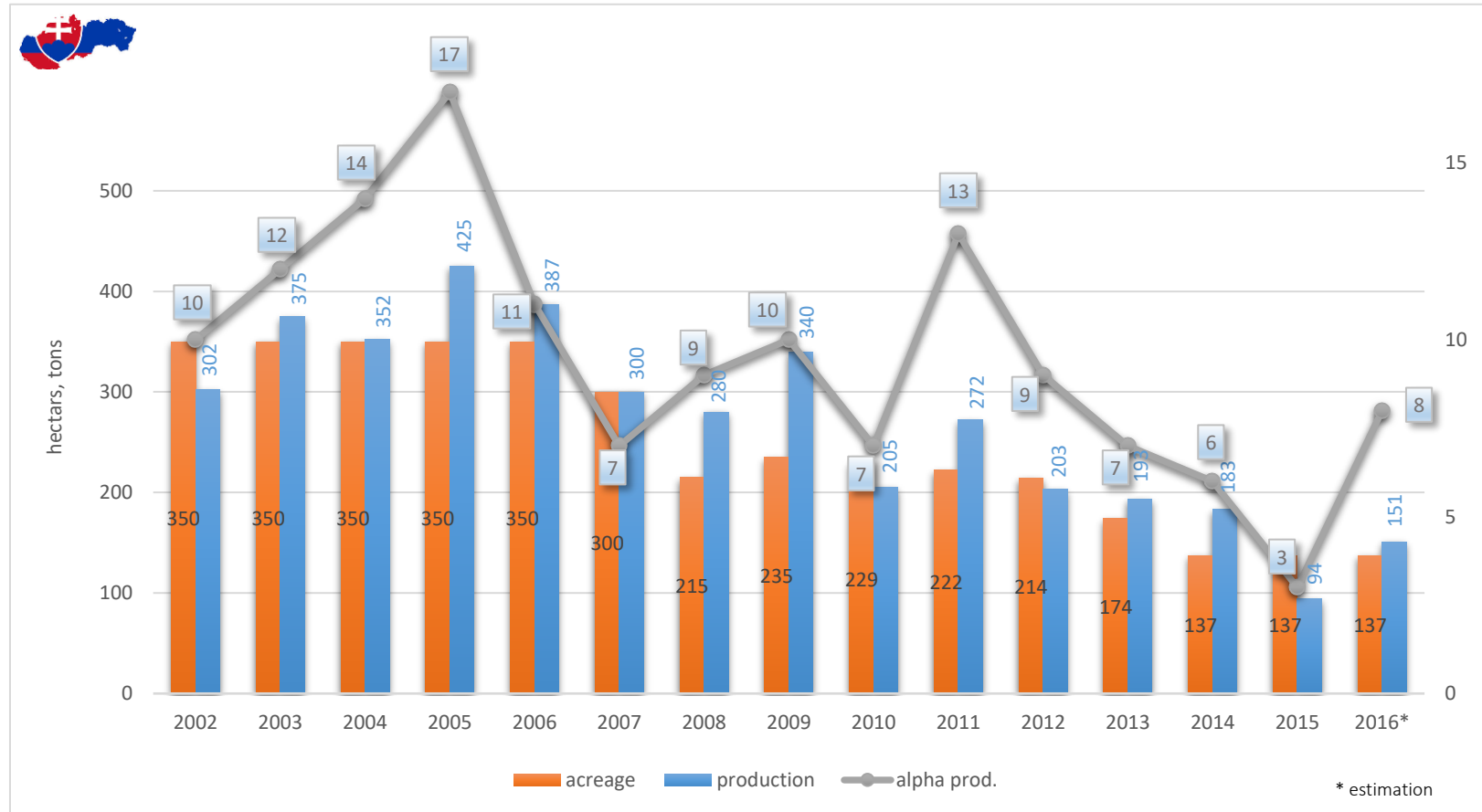


Figure 13: Slovenia hop crops 2002 - 2016*

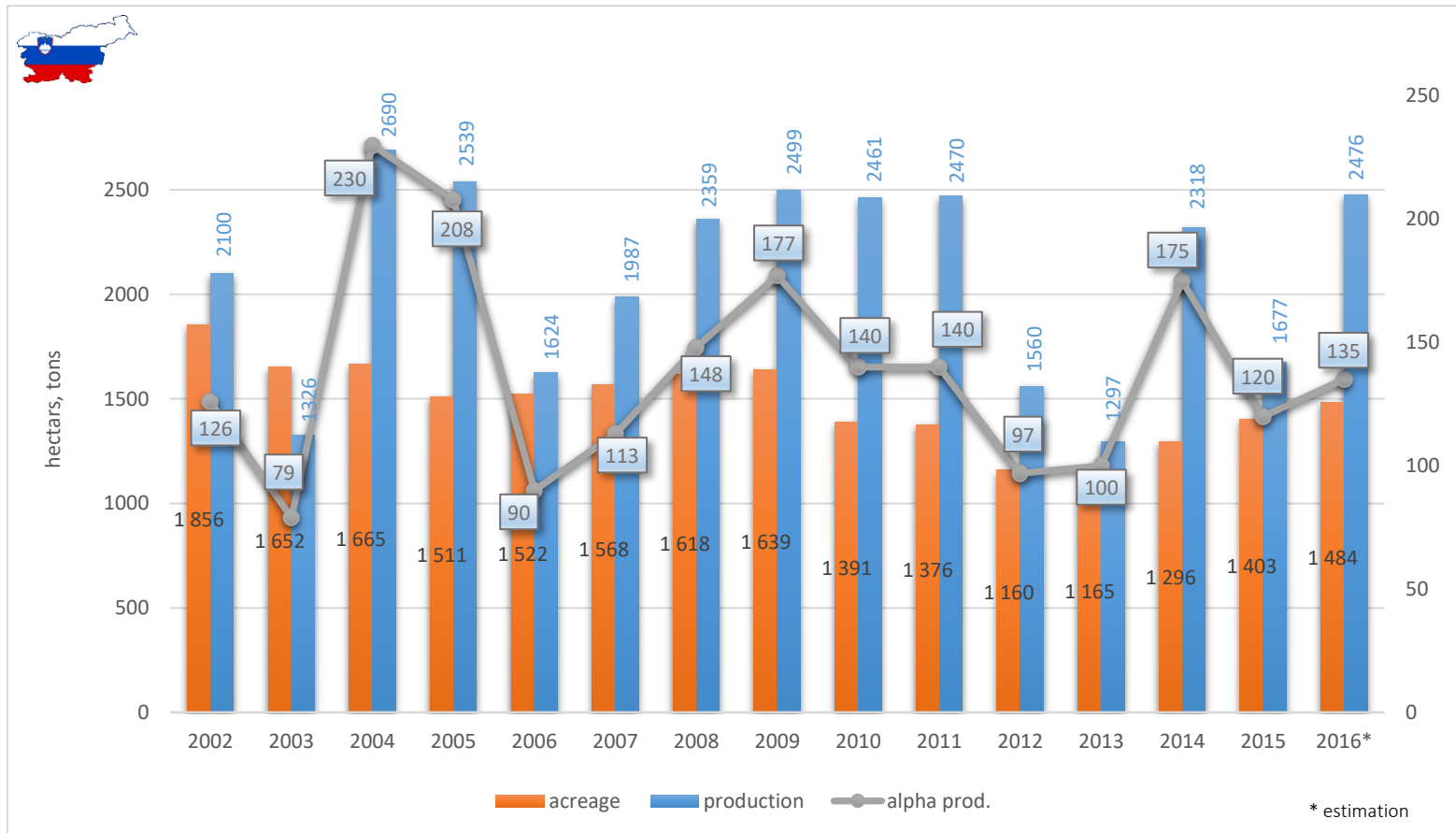


Figure 14: Spain hop crops 2002 - 2016*

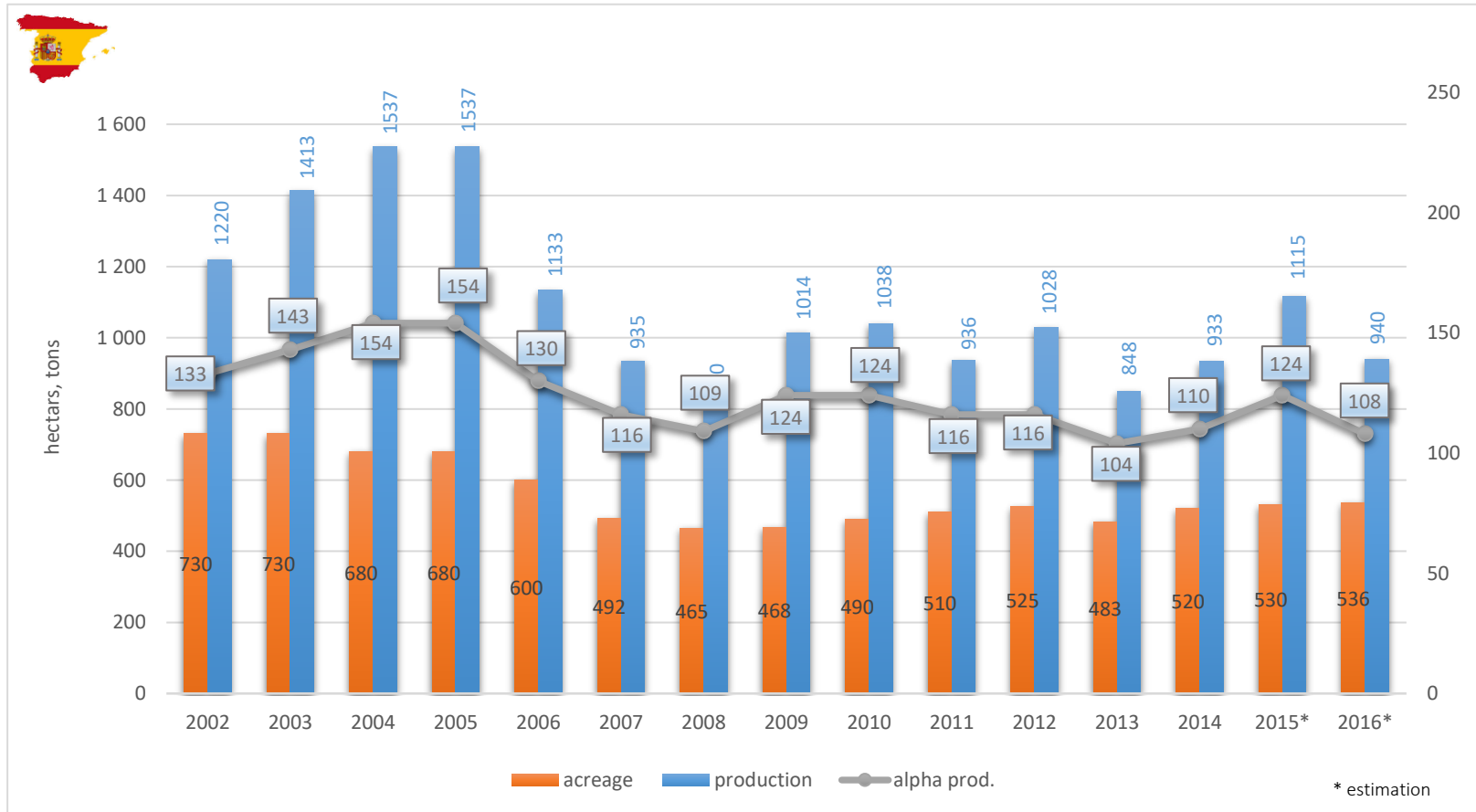


Figure 15: Ukraine hop crops 2002 - 2016*

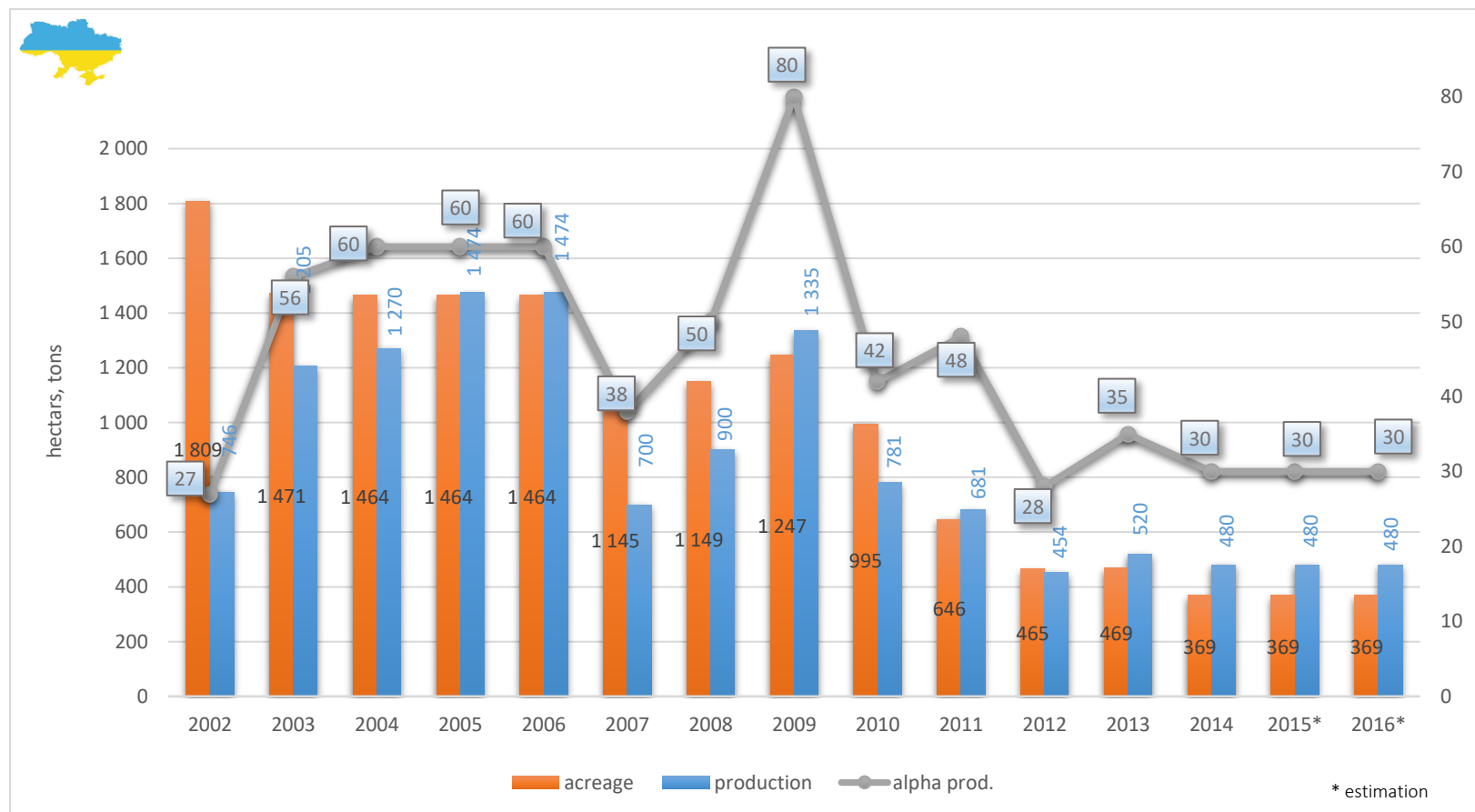


Figure 16: UK-England hop crops 2002 - 2016*

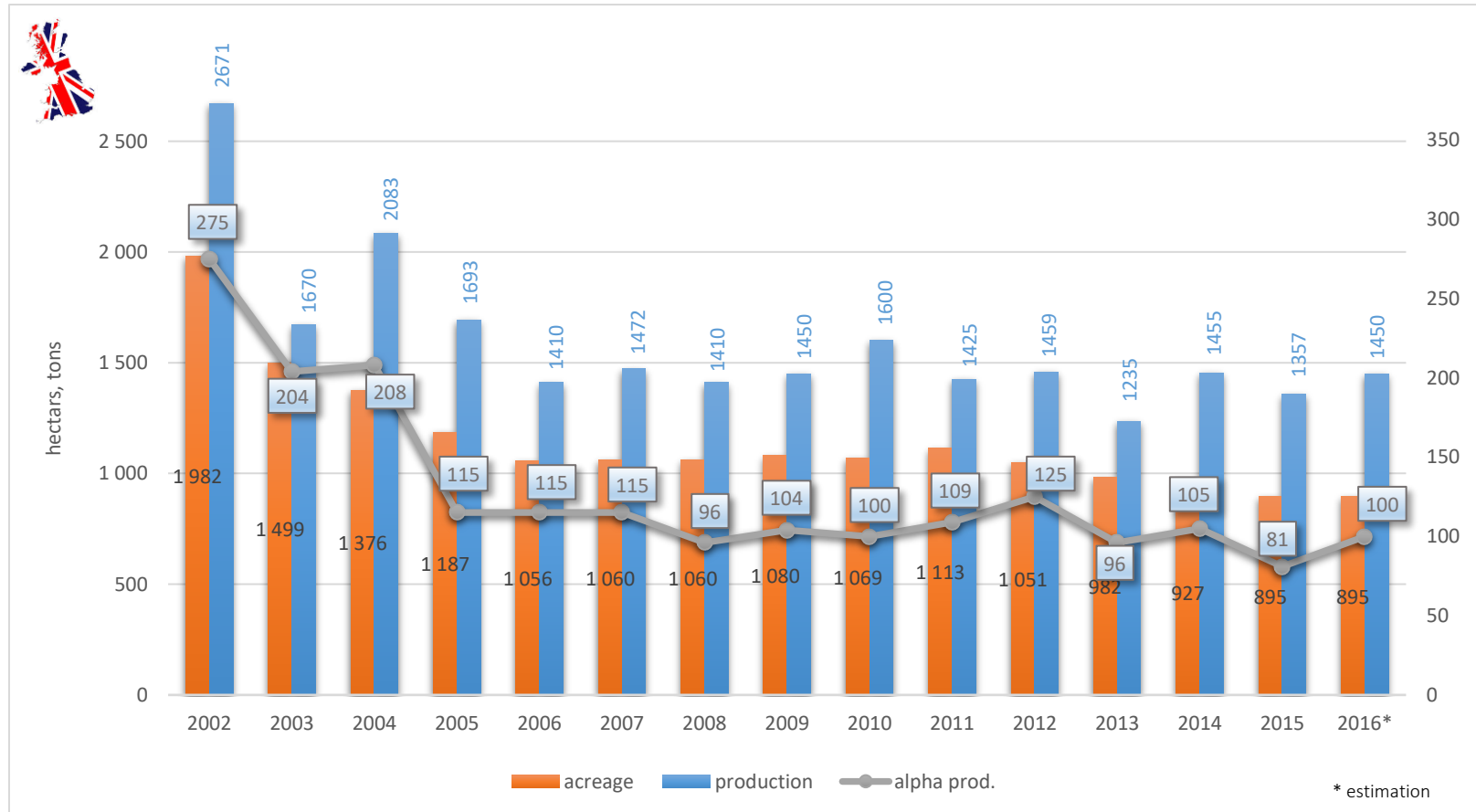


Figure 17: USA hop crops 2002 - 2016*

