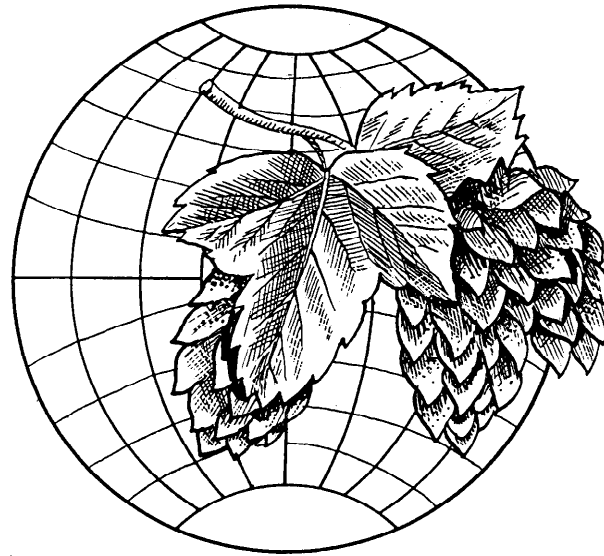


# INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

WASHINGTON, D.C., USA

APRIL, 2017



# International Hop Growers' Convention

## IHGC - Economic Commission Summary Reports

Washington, D.C., USA - April, 9, 2017

Country	Hop Acreage 2016 (Hectares, Ha)					Hop Production 2016 (in MT = 1.000 kg)				Alpha acid Prod. MT	Hop Acreage 2017 (Hectares, Ha) estimations					Hop Production 2017 (in MT = 1.000 kg) estimations				Alpha acid Prod. MT
	Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	Aroma		Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	MT		
Australia <sup>°</sup>	100	445	545	57	545	205	900	1 105	130	100	445	545	57	545	200	1 000	1 200	140		
Austria	187	58	245	4	249	365	114	479	41	192	58	250	6	256	320	110	430	34		
Belgium	89	60	149	4	149	107	91	198	15	105	54	159	11	160	147	87	234	18		
China <sup>°</sup>	200	1 800	2 000	0	2 000	300	4 200	4 500	300	200	1 800	2 000	0	2 000	300	4 200	4 500	300		
Czech Republic	4 381	46	4 427	348	4 775	7 610	102	7 712	341	4 565	45	4 610	290	4 900	6 020	80	6 100	245		
France	381	33	414	45	459	700	72	772	25	411	35	446	31	477	711	69	780	25		
Germany	10 063	7 254	17 317	1 281	18 598	22 266	20 500	42 766	4 775	10 400	7 800	18 200	1 300	19 500	19 300	19 700	39 000	4 300		
New Zealand	360	52	412	0	412	679	115	794	75	371	71	442	30	442	620	140	760	72		
Poland	619	825	1 444	90	1 534	930	1 733	2 663	243	659	875	1 534	100	1 634	989	1 837	2 826	258		
Romania <sup>°</sup>	68	192	260	10	270	55	122	177	18	68	192	260	10	270	55	122	177	18		
Russia <sup>°</sup>	84	54	138	20	158	92	70	162	9	84	54	138	20	158	92	70	162	9		
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	187	0	187	7	137	0	137	0	137	160	0	160	6		
Slovenia	1 312	23	1 335	149	1 484	2 400	76	2 476	135	1 427	23	1 450	130	1 580	2 530	70	2 600	140		
South Africa	7	406	413	0	413	17	848	865	100	20	390	410	14	424	45	665	710	85		
Spain	0	536	536	0	536	0	946	946	111	0	536	536	0	536	0	950	950	111		
Ukraine <sup>°</sup>	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30		
UK-England	713	206	919	0	919	1 000	400	1 400	111	732	210	942	23	942	1 000	400	1 400	111		
USA	17 256	4 314	21 570	3 263	21 570	29 421	10 785	40 206	4 005	18 732	4 800	23 532	1 962	23 532	31 844	12 480	44 324	4 680		
<b>IHGC</b>	<b>36 300</b>	<b>16 397</b>	<b>52 697</b>	<b>5 283</b>	<b>54 656</b>	<b>66 792</b>	<b>41 230</b>	<b>108 022</b>	<b>10 482</b>	<b>38 546</b>	<b>17 481</b>	<b>56 027</b>	<b>3 996</b>	<b>57 941</b>	<b>64 791</b>	<b>42 136</b>	<b>106 927</b>	<b>10 593</b>		
Difference ∑ 2017-2016										2 246	1 084	3 330	-1 287	3 285	-2 001	906	-1 095	111		

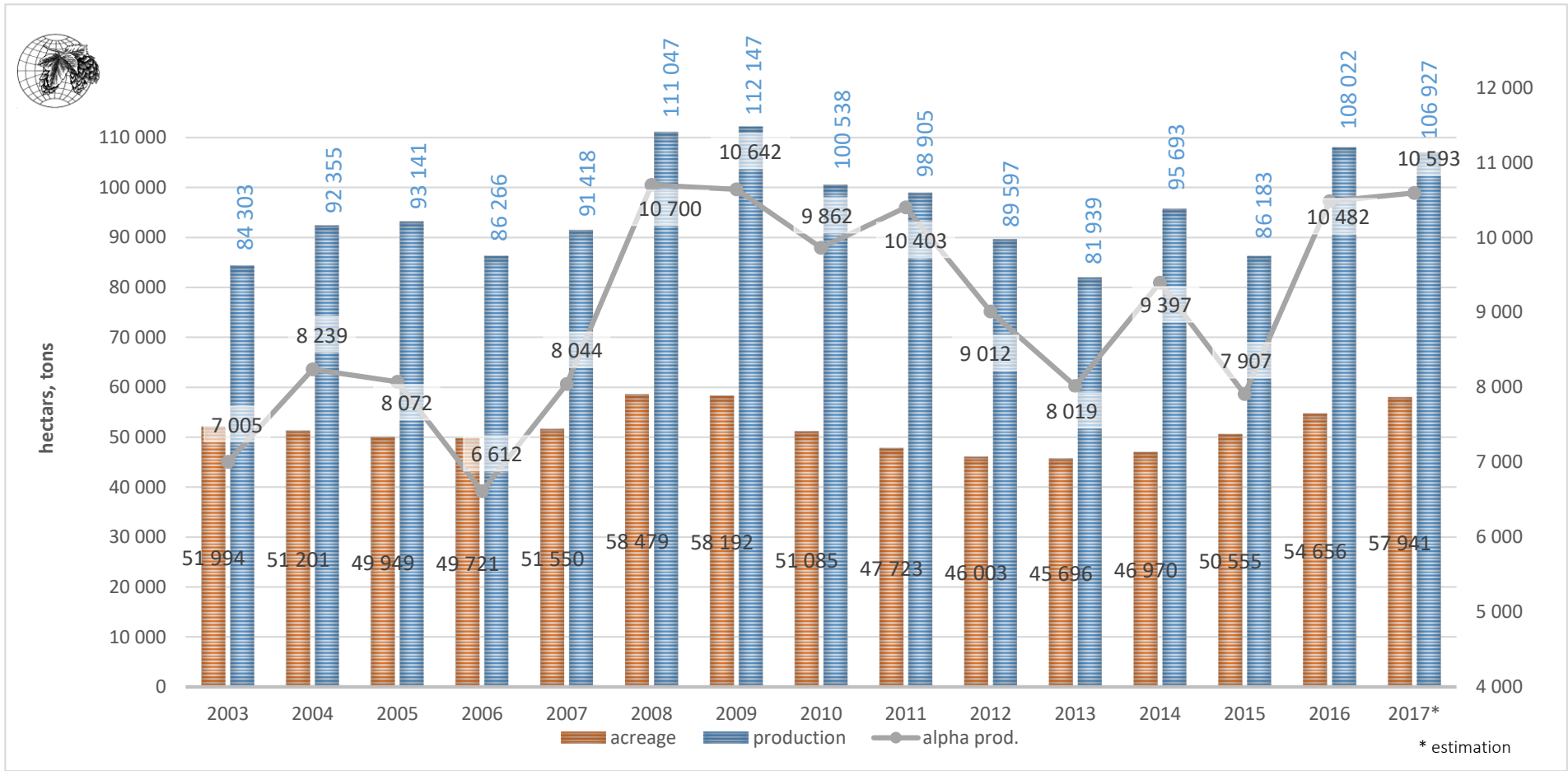
<sup>°</sup> Since no country updates were available, figures from Nuremberg 2016 were used.

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

\* IHGC estimation

Blue colored - correction from the meeting

Figure 1: Comparison of IHGC crops 2003 - 2017\* (acreage, production, alpha acids production)





# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country:

**Austria**

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	23,4	6,4	19,2	6,0	-4,2	-17,9
Alpha	17,1	15,0	14,3	13,0	-2,8	-16,4
Total	40,5		33,5			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons	430	400	330	320	200	
% Crop / Year N	100	95	80	75	50	

Unsold Hops (M1) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	0	8,1			
Alpha Hops	0	9			
Average Price					
<b>Contract Prices</b>					
Aroma Hops	6,5	7,3	7,2	-1,4	Erzeugerpreis / kg RH
Alpha Hops	7,2	7,7	7,5	-2,6	Erzeugerpreis / kg RH
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: 03.04.2017

Member Organization:



# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country: <b>Belgium</b>
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Alpha Prod.	Year N-1	2016	Year N	2017	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			13,0	11,5		
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	60%	60%	40%	40%	40%	40%

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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

An increased demand for aroma hops is still on,  
Some old Belgian varieties are coming back in production,

Country, Date: 4/0

Member Organization(s): Joris Cambie





# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington, D.C., USA

Country: <b>Czech Republic</b>
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Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	331,0		235,0		-96,0	-29,0
Alpha	10,0		10,0		0,0	0,0
Total	341,0		245,0		-96,0	-28,2

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	100	100	100	95	90	85

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops	6,8	7,3			farmer price
Alpha Hops	4,5	5			farmer price
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:  
30.03.2017

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

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country:

**France**

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	381	411	30	107,9%
Alpha	33,4	34,6	1	103,6%
Total	414	445,6	32	107,6%

New Hop Area (Ha)	Year N-1	Year N 2017 (estimate)
Aroma	42,4	31,4
Alpha	2,6	0
Total	45	31,4

TOTAL Hop Area (Ha)	Year N-1	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	423,4	442,4	19	104,5%
Alpha	36	34,6	-1	96,1%
Total	459	477	18	103,9%

Production MT=Metric Tons	Year N-1 0	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	700	711	11	101,6%
Alpha	72	69	-3	95,8%
Total	772	780	8	101,0%

Yield MT/Ha	Year N-1 0	Year N 2017 (estimate)	Difference %
Aroma	1,8	1,6	0,9
Alpha	2,2	2,0	0,9
Total	1,9	1,7	0,9

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)
<b>Aroma</b>						
Strisselspalt	187	183	-4	2,00		
Aramis	48,5	54,3	5,8	5,80		
Tradition	31	27	-4	4,80		
Triskel	22	35	13	3,50		
Fuggle	44,3	47,7	3,4	4,60		
Golding	44,6	46,6	2	3,50		
Challenger	5,7	5,7	0	6,30		
Barbe-Rouge	9,5	10,6	1,1	6,00		
Mistral	7	7,6	0,6	5,50		
Cascade	2	4	2			
<b>Alpha</b>						
Columbus	5,6	4,3	-1,3	10,00		
Brewers Gold	15	15	0	5,50		
Nugget	6,3	6,3	0	10,00		
Magnum	4,7	4,7	0	12,00		
Target	5,9	5,9	0	10,50		

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country:

**France**

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	17,2	3,2			-17,2	0,0
Alpha	7,8	7,4			-7,8	0,0
Total	25,0	3,9			-25,0	0,0

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	95	90	80	70	50	50

Unsold Hops (M1) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production		700	72	772
- Sold Production		680	72	752
= Unsold Hops		20	0	20
% unsold Hops		2,86	0,00	2,59

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops		7			
Alpha Hops		5,5			
Average Price					
<b>Contract Prices</b>					
Aroma Hops		6			
Alpha Hops		5			
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:  
March 22nd 2017

Member Organization(s):  
AGPH  
Francis Heitz

# International Hop Growers' Convention

IHGC-Economic Commission: April 2017 - Washington D.C., USA

Country:

**Germany**

Hop area ( ha )	Year N-1 2016	Year N 2017 estimate	Difference N - (N-1)	Difference %
Aroma	10063	10400	337	3,3
Alpha	7254	7800	546	7,5
Total	17317	18200	883	5,1

New Hop Area ( ha )	Year N-1 2016	Year N 2017 estimate
Aroma	471	400
Alpha	810	900
Total	1281	1300

TOTAL Hop area ( ha )	Year N-1 2016	Year N 2017 estimate	Difference N - (N-1)	Difference %
Aroma	10534	10800	266	2,5
Alpha	8064	8700	636	7,9
Total	18598	19500	902	4,8

Production MT	Year N-1 2016	Year N 2017 estimate	Difference N - (N-1)	Difference %
Aroma	22 266	19 300	-2 966	-13,3
Alpha	20 500	19 700	-800	-3,9
Total	42 766	39 000	-3 766	-8,8

Yield MT/HA.	Year N-1 2016	Year N 2017 estimate	Difference %
Aroma	2,1	1,8	-15,5
Alpha	2,5	2,3	-10,9
Total	2,3	2,0	-13,0

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						
Perle	3093	3000	-93	8,2	7,7	-0,5
Hall.Tradition	2827	2700	-127	6,4	6,3	-0,1
Hersbrucker	943	920	-23	2,8	2,9	0,1
Hallertauer	733	700	-33	4,3	4	-0,3
Tettnanger	732	730	-2	3,8	3,8	0
Spalter Select	534	530	-4	5,2	4,9	-0,3
Saphir	450	430	-20	4	4,1	0,1
Spalter	119	120	1	4,3	3,8	-0,5
Mand. Bavaria	346	350	4	8,7	7,8	-0,9
Alpha						
Herkules	4884	5800	916	17,3	16,8	-0,5
Hall. Magnum	2196	2000	-196	14,3	13,8	-0,5
Hall.Taurus	357	300	-57	17,6	16,6	-1
North. Brewer	266	270	4	10,5	9,3	-1,2
Nugget	152	130	-22	12,9	11,4	-1,5
Polaris	106	130	24	21,3	19,4	-1,9
Hall. Merkur	21	20	-1	13,4	13,4	0
Brewers Gold	17	15	-2	7,2	7,2	0
Comet	7	7	0			0

# International Hop Growers' Convention

IHGC-Economic Commission: April 2017 - Washington DC, USA

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

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	estimate	%		%
Aroma	1420,0	6,4	1100,0	5,7	-320,0	-0,7
Alpha	3355,0	16,4	3200,0	16,2	-155,0	-0,1
Total	4775,0	11,2	4300,0	11,0	-475,0	-0,1

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric Tons	38800	34195	30239	27825	15664	13029
% Crop / Year N	99	88	78	71	40	33

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production		22 266	20 500	42 766
- Sold Production		22 266	20 500	42 766
= Unsold Hops		0,00	0,00	0,00
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. 2015 vs. 2014	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	9,09	6,57		-27,70	Farmer Price
Alpha Hops	5,48	6,59		20,30	Farmer Price
Average Price	6,5	6,58		1,20	Farmer Price
<b>Contract Prices</b>					
Aroma Hops	4,92	5,36		8,90	Farmer Price
Alpha Hops	3,74	4,39		17,40	Farmer Price
Average Price	4,34	4,88		12,40	Farmer Price
<b>Average Prices</b>					
Aroma Hops	5,15	5,6		8,70	Farmer Price
Alpha Hops	3,97	4,8		20,90	Farmer Price
<b>AVERAGE</b>	5,54	5,21		-6,00	Farmer Price

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Germany

30.03.2017

Verband deutscher Hopfenpflanzer

gez. Brunner



# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country: <b>New Zealand</b>
--------------------------------

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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

A decrease in production is seen due to a less than optimum growing season and in some instances performance of baby plants in new ground.  
A very wet spring and unseasonably cool summer meant that many plants did not develop to their potential. An increase in volume next season is expected as more plantings come on line  
Market conditions remain favourable for New Zealand varieties.

Country, Date:

Member Organization(s):

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country:

**Poland**

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (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

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma	40	20
Alpha	50	80
Total	90	100

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	659,43	679,43	20	3,0
Alpha	874,67	954,67	80	9,1
Total	1534,1	1634,1	100	6,5

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	930	989	59	6,4
Alpha	1 733	1 837	104	6,0
Total	2 663	2 826	163	6,1

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma	1,5	1,5	0,0
Alpha	2,1	2,1	0,0
Total	1,8	1,8	0,0

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Lubelski	432,7	452,7	20			
Lomik	4,14	4,14	0			
Perle	61,1	61,1	0			
Sybilla	79,97	79,97	0			
HT	79,52	79,52	0			
Cascade	1,17	1,17	0			
Puławski	0,83	0,83	0			
Alpha						
Marynka	293,26	293,26	0			
Magnum	501,62	541,62	40			
lunga	4,98	4,98	0			
Taurus	8,22	8,22	0			
Magnat	63,68	103,68	40			
Oktawia	0,56	0,56	0			
Klony hodowlane	2,35	2,35	0			



# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country:

**Poland**

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	47,4	5,1	50,4	5,1	3,0	0,0
Alpha	195,8	11,3	207,6	11,3	11,8	0,0
Total	243,3	9,1	258,0	9,1	14,7	0,0

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production		929,92	1733,41	2663,3
- Sold Production		929,92	1733,41	2663,3
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	7	7			
Alpha Hops	4,65	4,65			
Average Price	5,83	5,83			
<b>Contract Prices</b>					
Aroma Hops	4,47	4,18			
Alpha Hops	3,54	3,49			
Average Price	4	3,84			
<b>Average Prices</b>					
Aroma Hops	5,73	5,59			
Alpha Hops	4,1	4,07			
<b>AVERAGE</b>	4,92	4,83			

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

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

Data according to the state as on 31.12.2016 r.

Officially certification of hops in Poland is ending with 31st of March and complete data for 2016 will be accessible in the middle of the April.

Country, Date:  
Poland, 29.03.2017

Member Organization(s):  
Polish Hop Growers Association



# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country: <b>Slovakia</b>
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Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	<i>(estimate)</i>	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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	7		
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: Menšík

Member Organization(s):



# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country: <b>Slovenia</b>
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Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	135,0					

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	85	85	70	60	60	60

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				2 476
- Sold Production				2 476
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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		5.2			
<b>Average Prices</b>	4.5-6,0				
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

A demand for the Styrian aroma hops encouraged also in 2017 growers to enlarge their acreage. In May, hop acreage in detail with the variety structure will be officially available. The new hop areas in Slovenia include varieties Aurora, Styrian golding and the new flavour ones - such as Styrian Wolf and Styrian Cardinal.

Country, Date:  
Slovenia, March 29, 2017

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

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country:

**South Africa**

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total				

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma		14
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	6,9	34,4		
Alpha	406	389,6		
Total	412,9	424	11	

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	17	45	28	
Alpha	848	665	-183	
Total	865	710	-155	

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma			
Alpha			
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						
Southern Aroma	0,5	3,1	2,6		4.6%	
Southern Passion	3	11,1	8,1		11.0%	
African Queen	3,4	20,2	16,8		12.0%	
Alpha						
Southern Dawn	38,2	38,2	0		12.0%	
Southern Promise	103,1	98,4	-4,7		10.6%	
Southern Star	251	251,8	0,8		14.1%	
U1/108	0,7	0,7	0		11.4%	
N1/69	0,3	0,3	0		10.0%	
Southern Brewer	1,7	0,2	-1,5		8.4%	

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country: <b>South Africa</b>
---------------------------------

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma			0,5			
Alpha			84,7			
Total			85,2			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N						

We grow for a brewer so this is not applicable (not just yet)

Unsold Hops (M1) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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

Country, Date:

Member Organization(s): Hop Farms

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country:  
**Spain**

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha	536			
Total	536			

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha	536			
Total	536			

Production (MT=Metric Ton)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha	946	950	4	
Total	946	950	4	

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma			
Alpha	1,8	1,8	
Total	1,8	1,8	

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Alpha	536	536				



# International Hop Growers' Convention

IHGC-Economic Committee: April 2017 - Washington D.C., USA

Country:

**Spain**

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha	110,7	110,0				
Total	110,7	110,0				

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons	1 100	1 100				
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>	<b>3,54</b>	<b>4,7</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

Country, Date

Member Organization(s):  
LÚPULOS DE LEON SAT

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017, Washington D.C. USA

Country:

**UK**

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	713	732	19	
Alpha	206	210	4	
Total	919	942	23	

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	713	732		
Alpha	206	210		
Total	919	942		

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	1 110	1 115		

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma			
Alpha			
Total			

Main Varieties (Ha = Hectares)	Year N-1 Total Hectares	Year N Total Hectares	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
E K Goldings	94	100		5,99		
Goldings	132	140		5,91		
First Gold	97	100		9,19		
Fuggles	90	85		5,32		
Challenger	53	53		8,36		
Progress	59	67		6,86		
Sovereign	55	57		6,20		
Alpha						
Admiral	29	27		15,51		
Target	80	75		11,98		
Pilgrim	68	72		10,45		
Northdown	15	18		8,02		

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017, Washington D.C. USA

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

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2016	2017	2018	2019	2020	2021
Metric tons						
% Crop / Year N	100	90	90	60	30	10

Unsold Hops (M1) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				-
% unsold Hops				-

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2016	% 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

No unsold hops in stock

Country, Date:

Member Organization(s):

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017, Washington D.C. USA

Country:

**USA**

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 256	18 732	1 476	8,6%
Alpha	4 314	4 800	486	11,3%
Total	21 570	23 532	1 962	9,1%

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 256	18 732	1 476	8,6%
Alpha	4 314	4 800	486	11,3%
Total	21 570	23 532	1 962	9,1%

*Includes 1115 ha outside of Pacific Northwest*

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	29 421	31 844	2 423	8,2%
Alpha	10 785	12 480	1 695	15,7%
Total	40 206	44 324	4 118	10,2%

44240

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %	Pounds/Acre
Aroma	1,70	1,70		1 517
Alpha	2,50	2,60		2 320
Total	1,86	1,88		1 680

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)
<b>Aroma/Dual</b>				9,0%	9,2%	
Azacca™, ADHA-483	203	243	40			
Cascade*	3 067	3 013	-54			
Centennial*	2 159	2 159	0			
Citra®, HBC 394	1 818	2 042	224			
Chinook	850	1 068	218			
El Dorado	270	276	6			
Jarrylo™, ADHA-881	51	31	-20			
Mosaic™, HBC 369	1 100	1 100	0			
Pekko™, ADHA-871	44	64	20			
Simcoe®, YCR 14	1 764	1 876	112			
Willamette	650	586	-64			

\*Total other (non-PNW) acreage estimated at 1115 ha. Cascade, Centennial and Chinook include estimates representing a contribution from those additional states.

<b>Alpha</b>				13,3%	14,2%	
Apollo™	392	392	0			
Bravo™	293	293	0			
CTZ	1 821	2 061	240			
Nugget	648	672	24			
Summit™	713	713	0			
Super Galena™	180	135	-45			

# International Hop Growers' Convention

IHGC-Economic Committee: April 2017, Washington D.C. USA

Country: <b>USA</b>
------------------------

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	4 005	10,1	4 680	10,6		

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	98	95	64	40	25	25

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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>	US\$4.38/lb	US\$5.72/lb			
	8.88 Euro/kg	11.60 Euro/kg			

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate \$1 USD = 0.92 Euro (24 MAR 2017)

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.

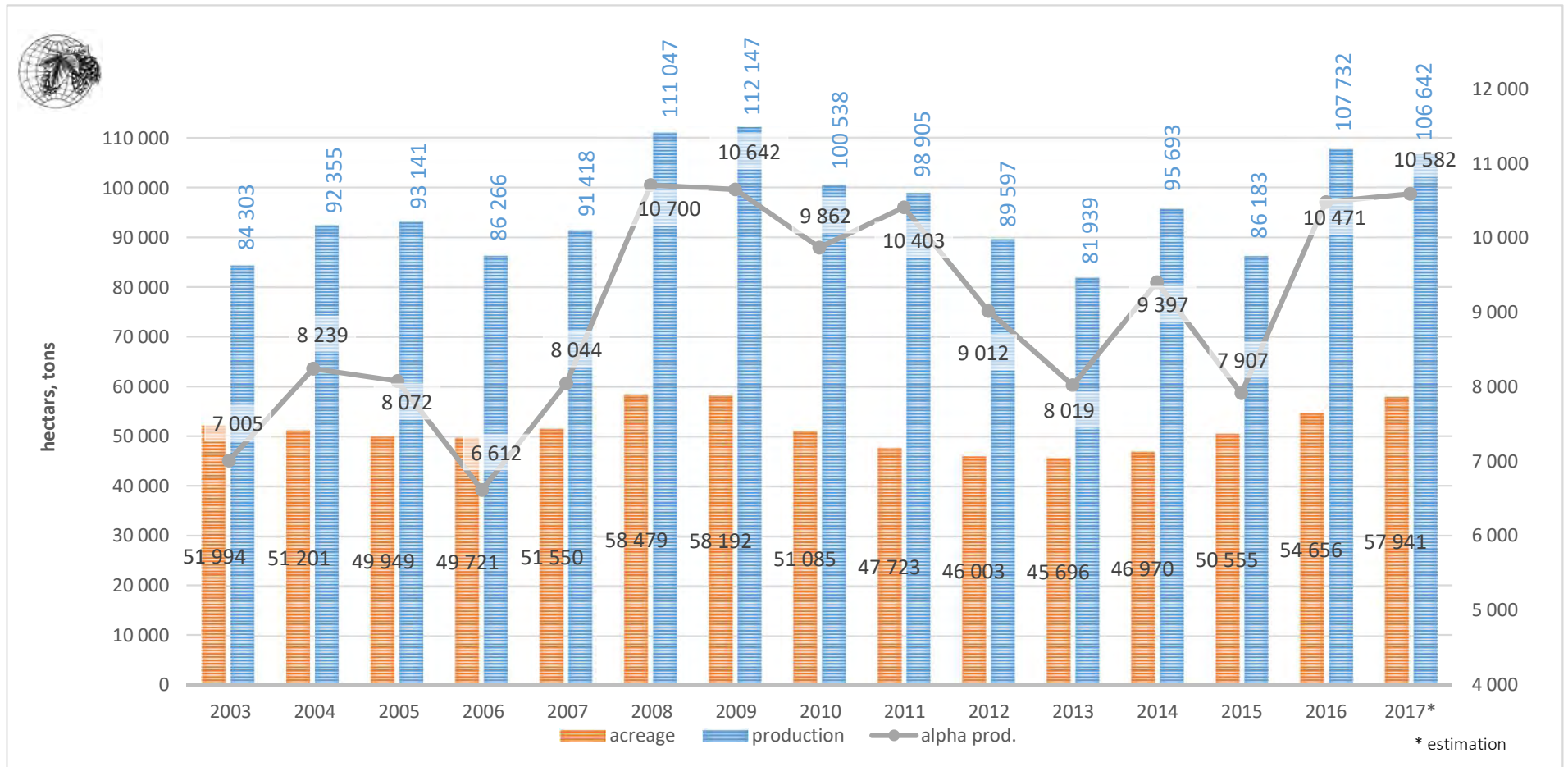
Alpha percentages are reported as 10% lower than spectro levels, to be more consistent with EBC results.

Country, Date:  
USA

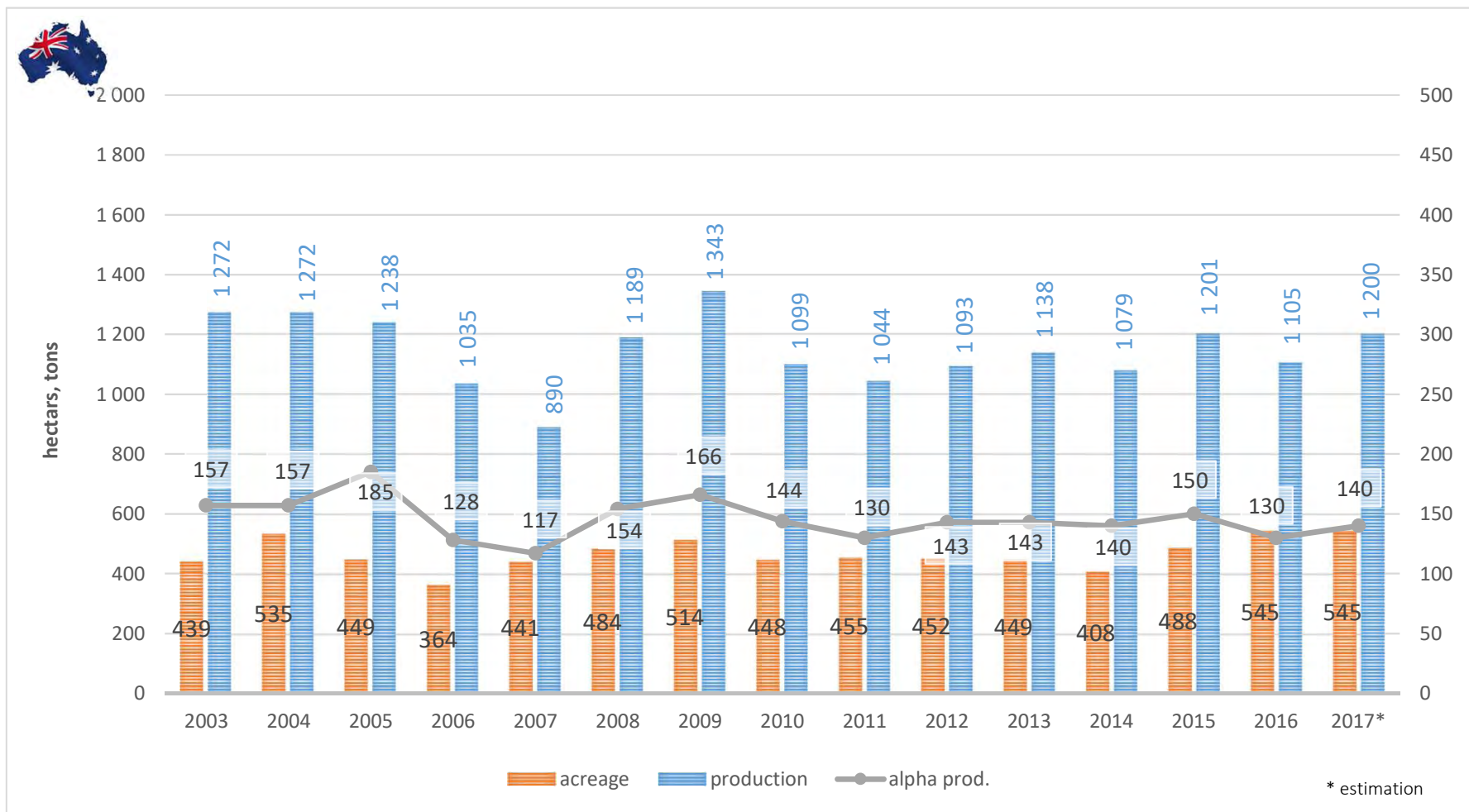
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Member Organization(s):  
Hop Growers of America

**Figure 1: Comparison of IHGC crops 2003 - 2017\* (acreage, production, alpha acids production)**



**Figure 2: Australia hop crops 2003 - 2017\***





**Figure 3: Austria hop crops 2003 - 2017\***

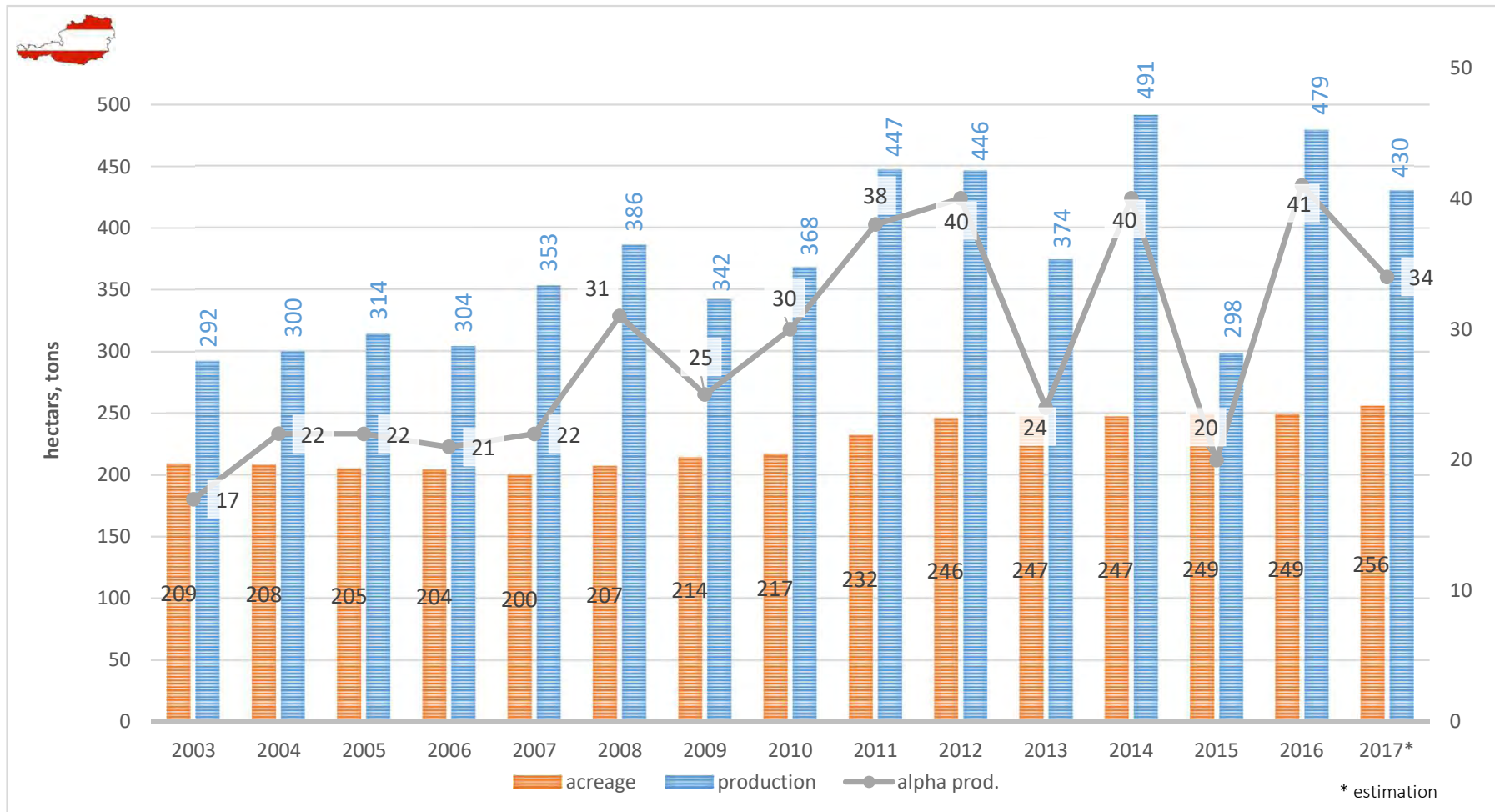
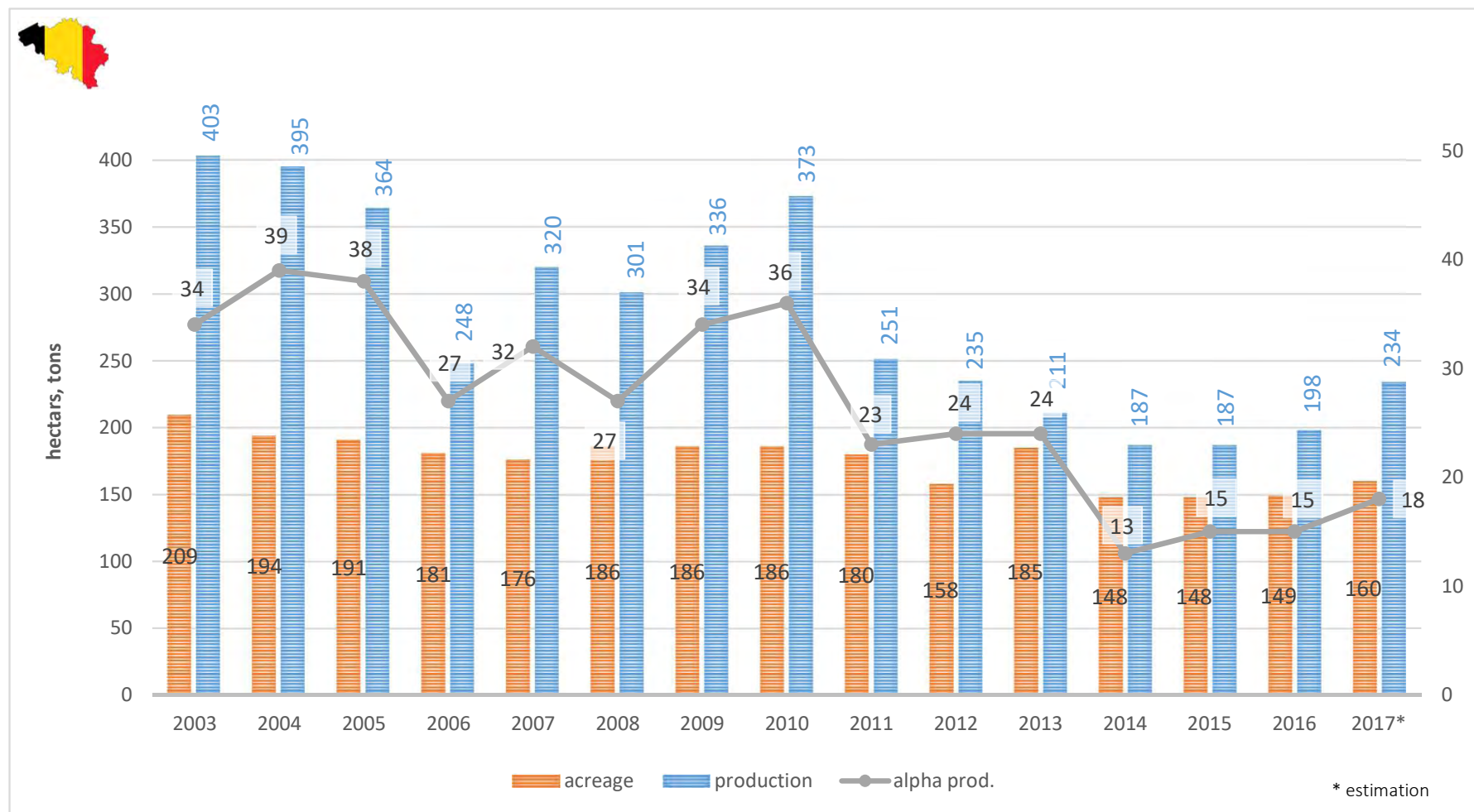
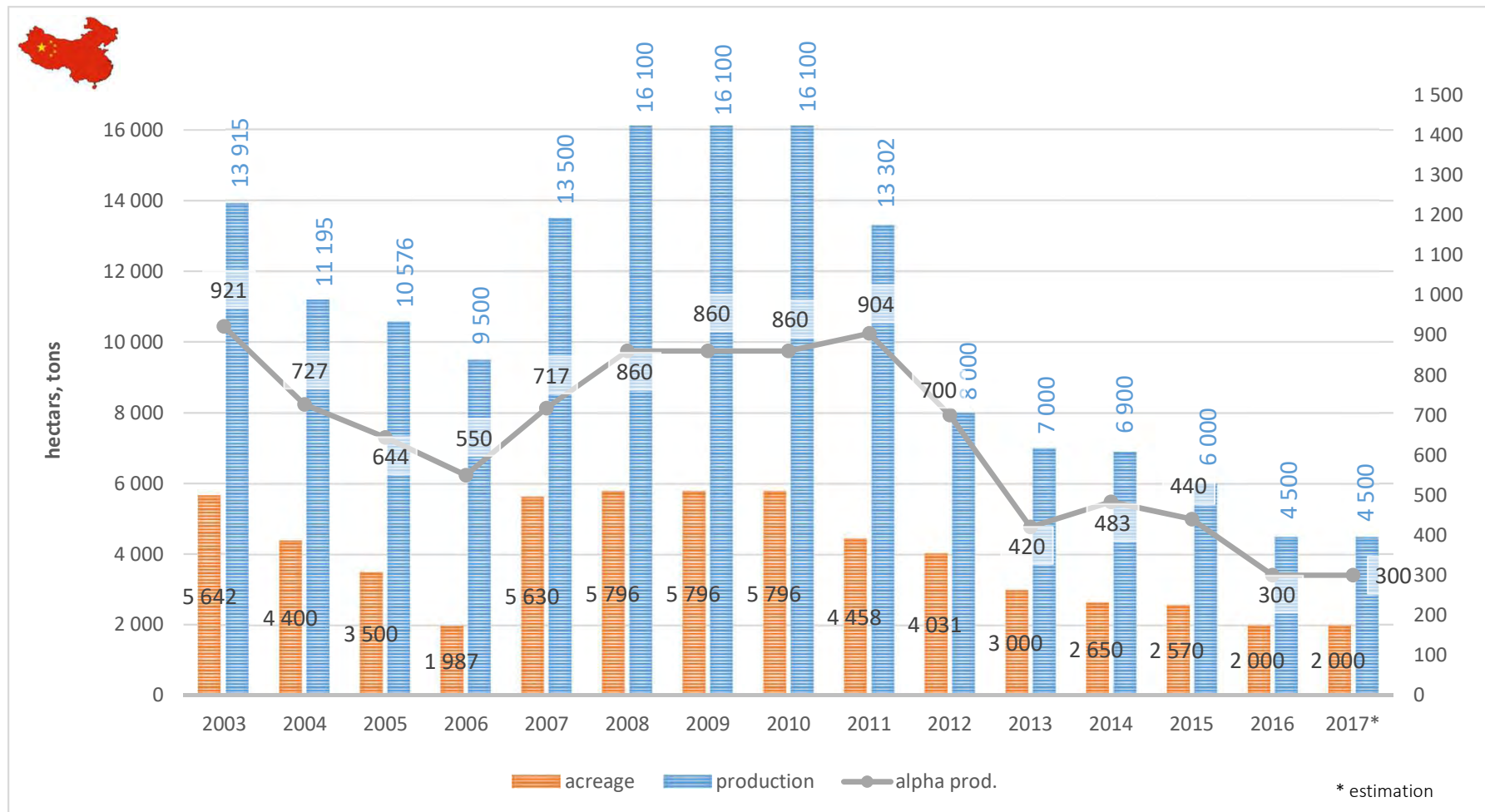




Figure 4: Belgium hop crops 2003 - 2017\*



**Figure 5: China hop crops 2003 - 2017\***



**Figure 6: Czech Republic hop crops 2003 - 2017\***

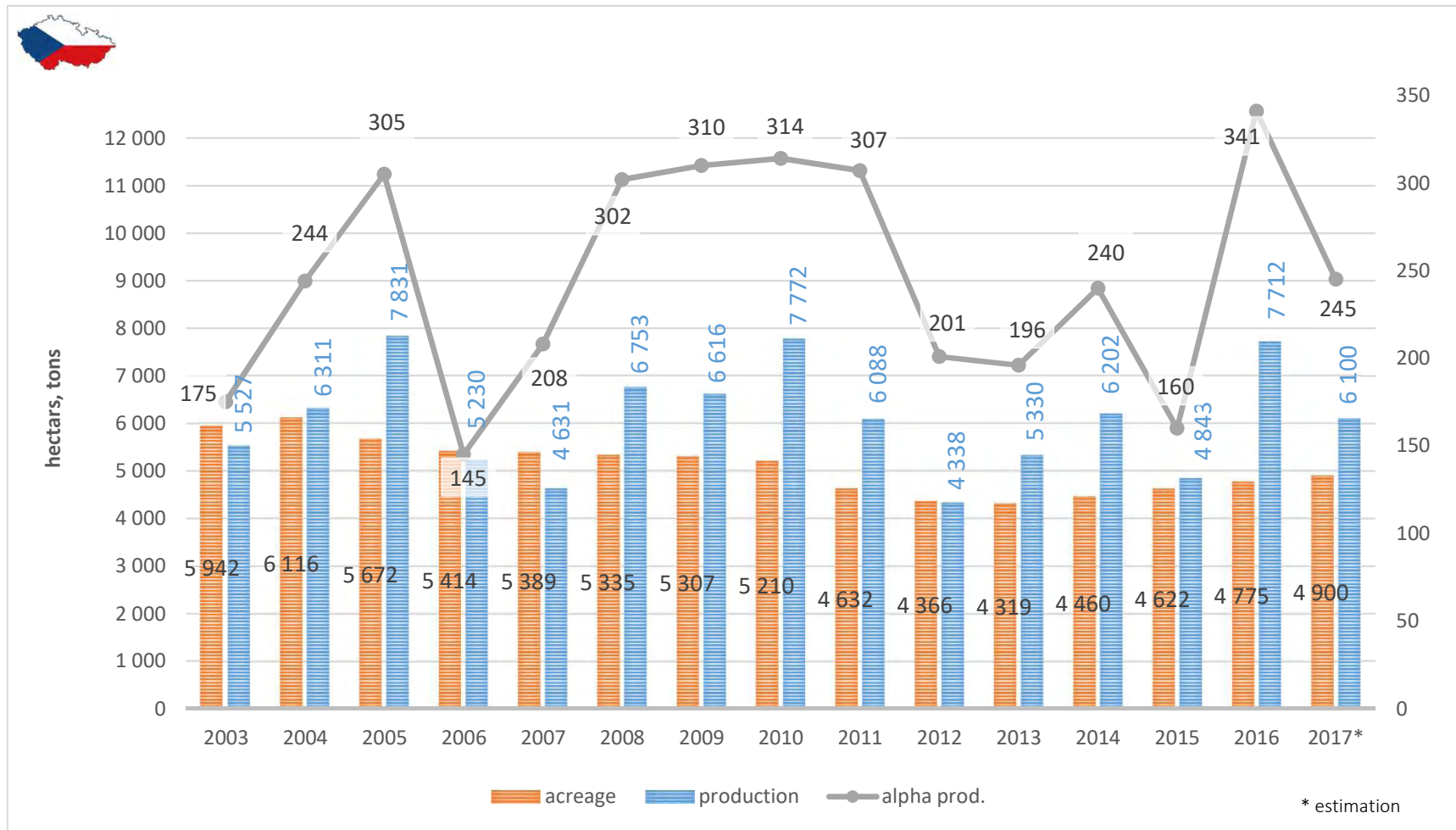
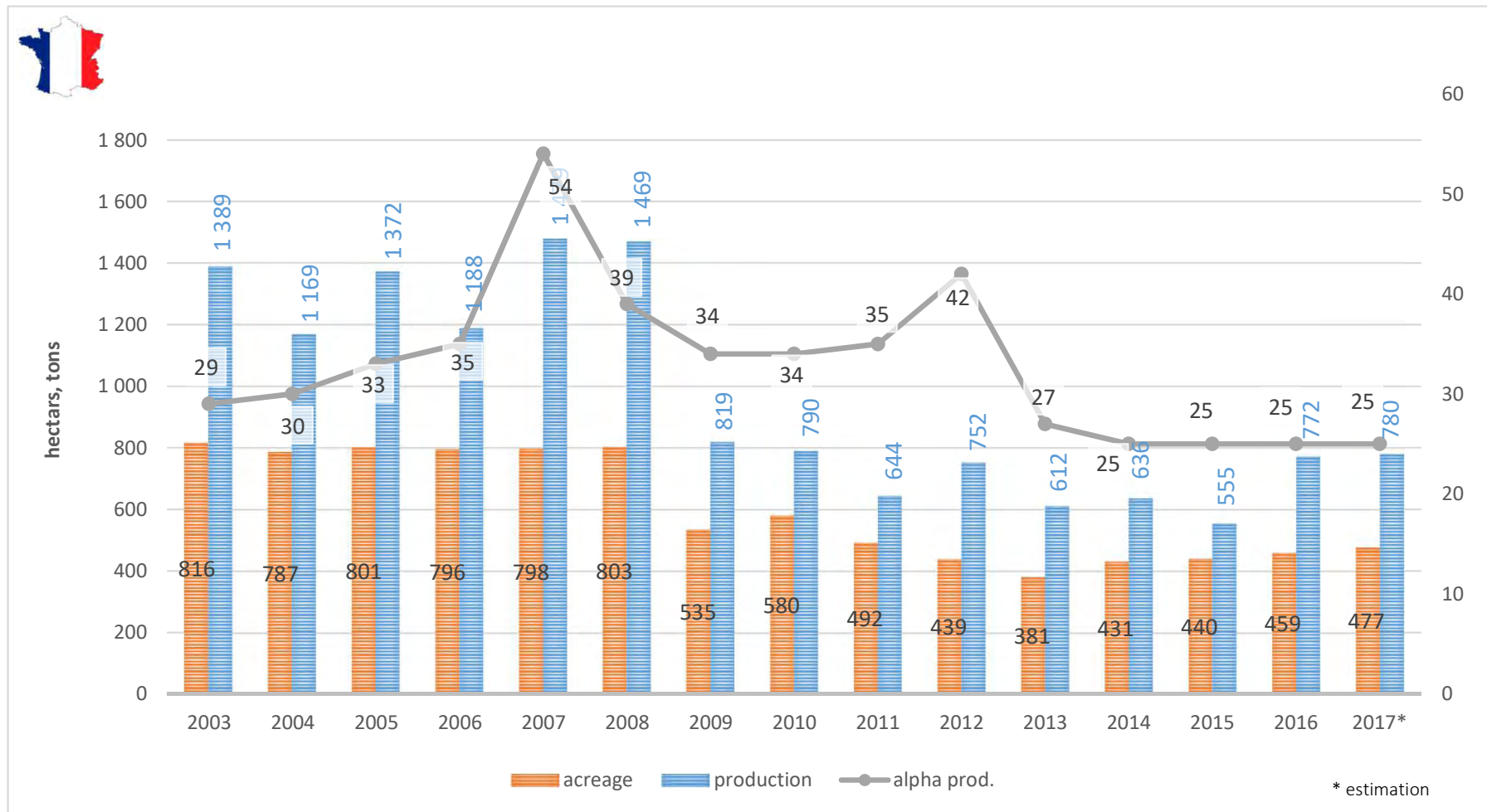
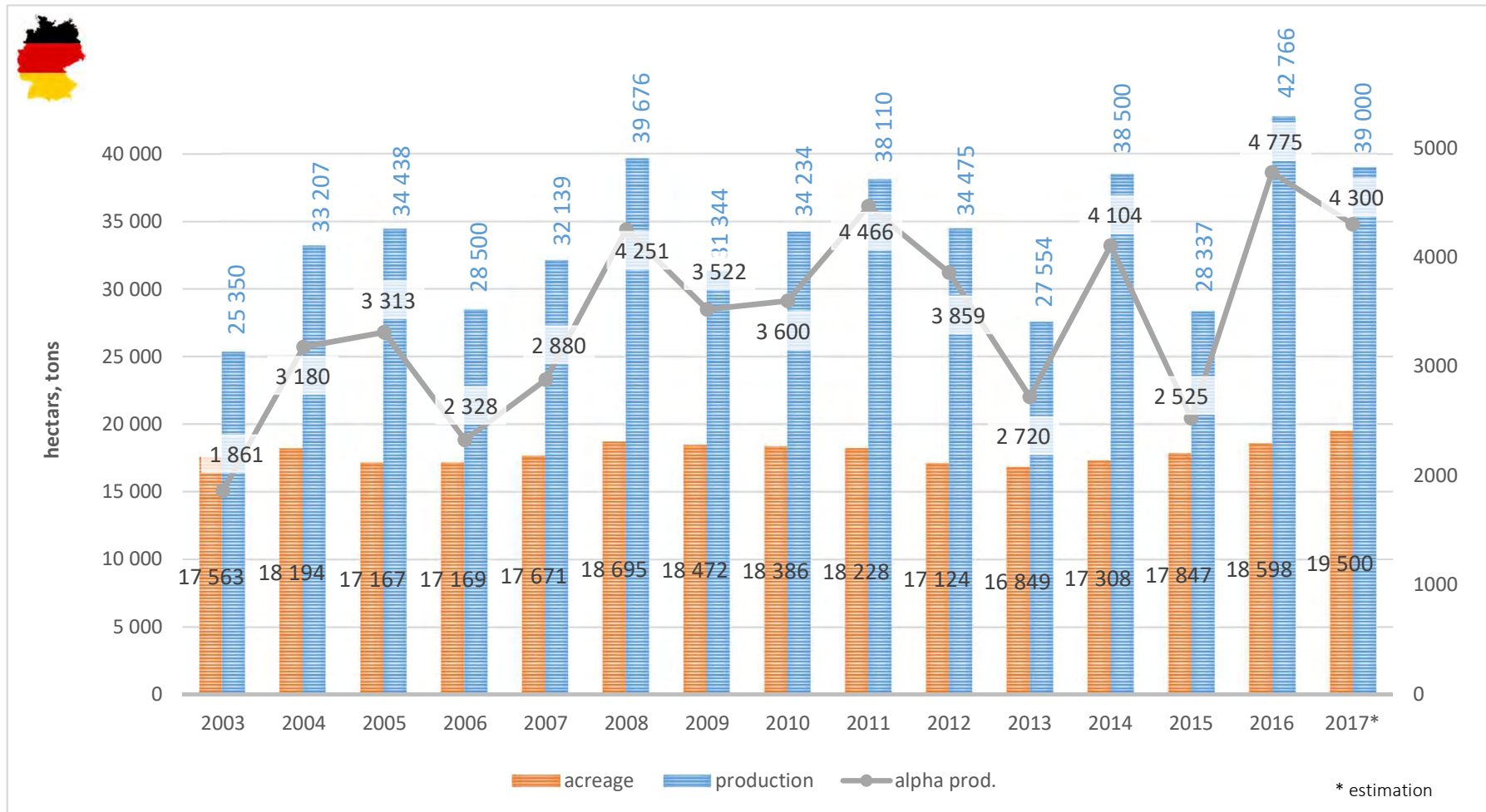


Figure 7: France hop crops 2003 - 2017\*

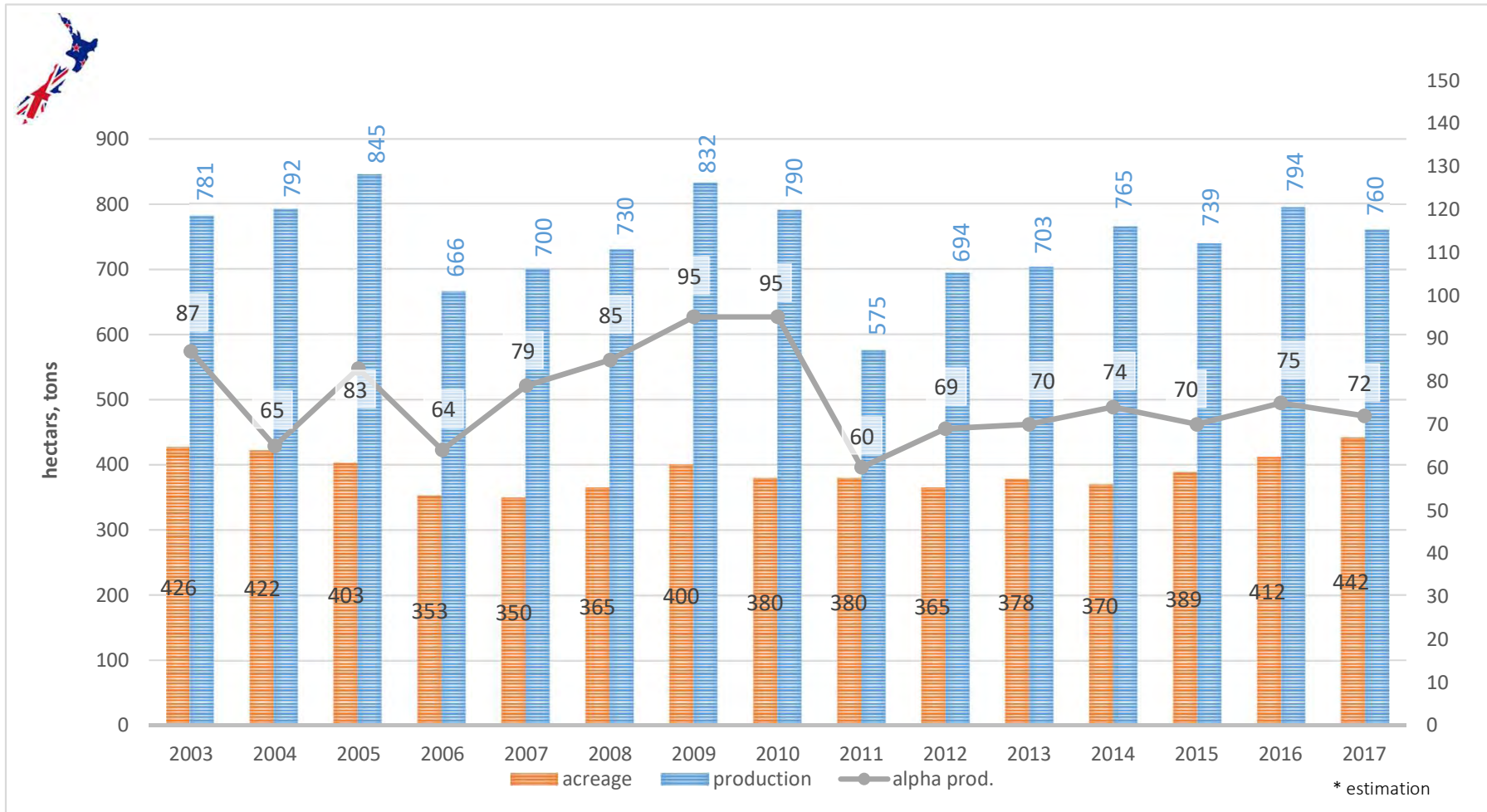




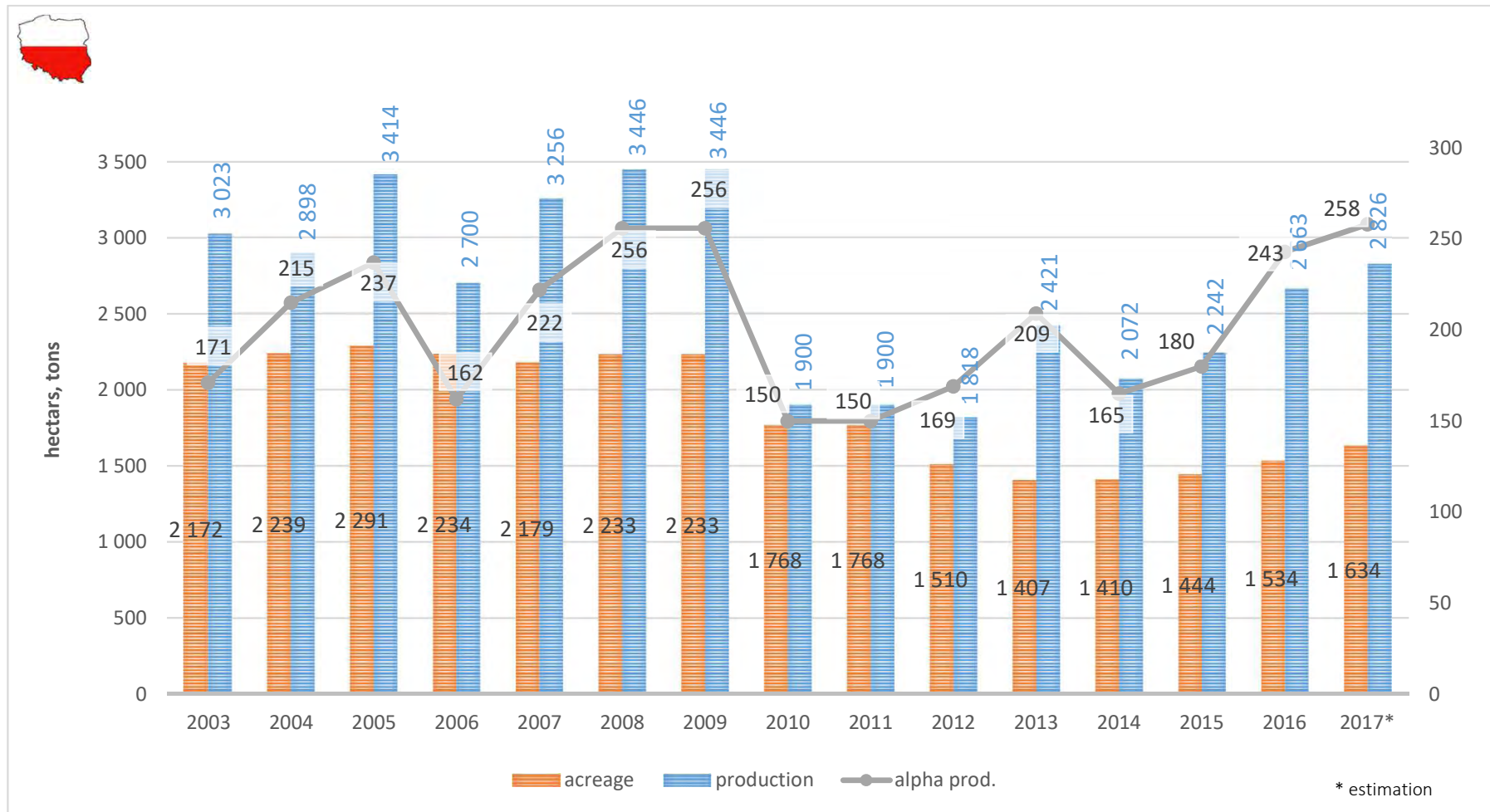
**Figure 8: Germany hop crops 2003 - 2017\***



**Figure 9: New Zealand hop crops 2003 - 2017**



**Figure 10: Poland hop crops 2003 - 2017\***



**Figure 11: Romania hop crops 2003 - 2017\***

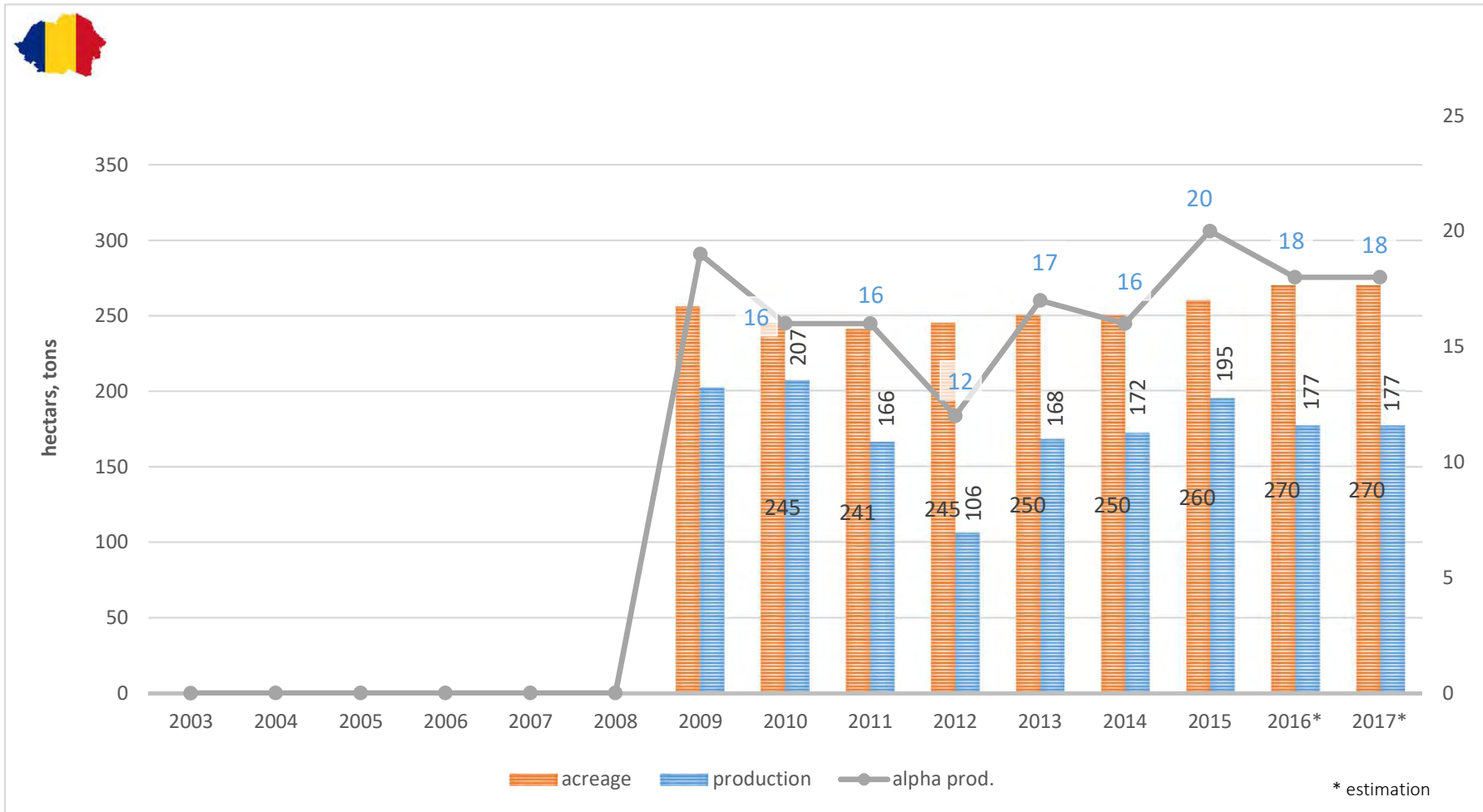
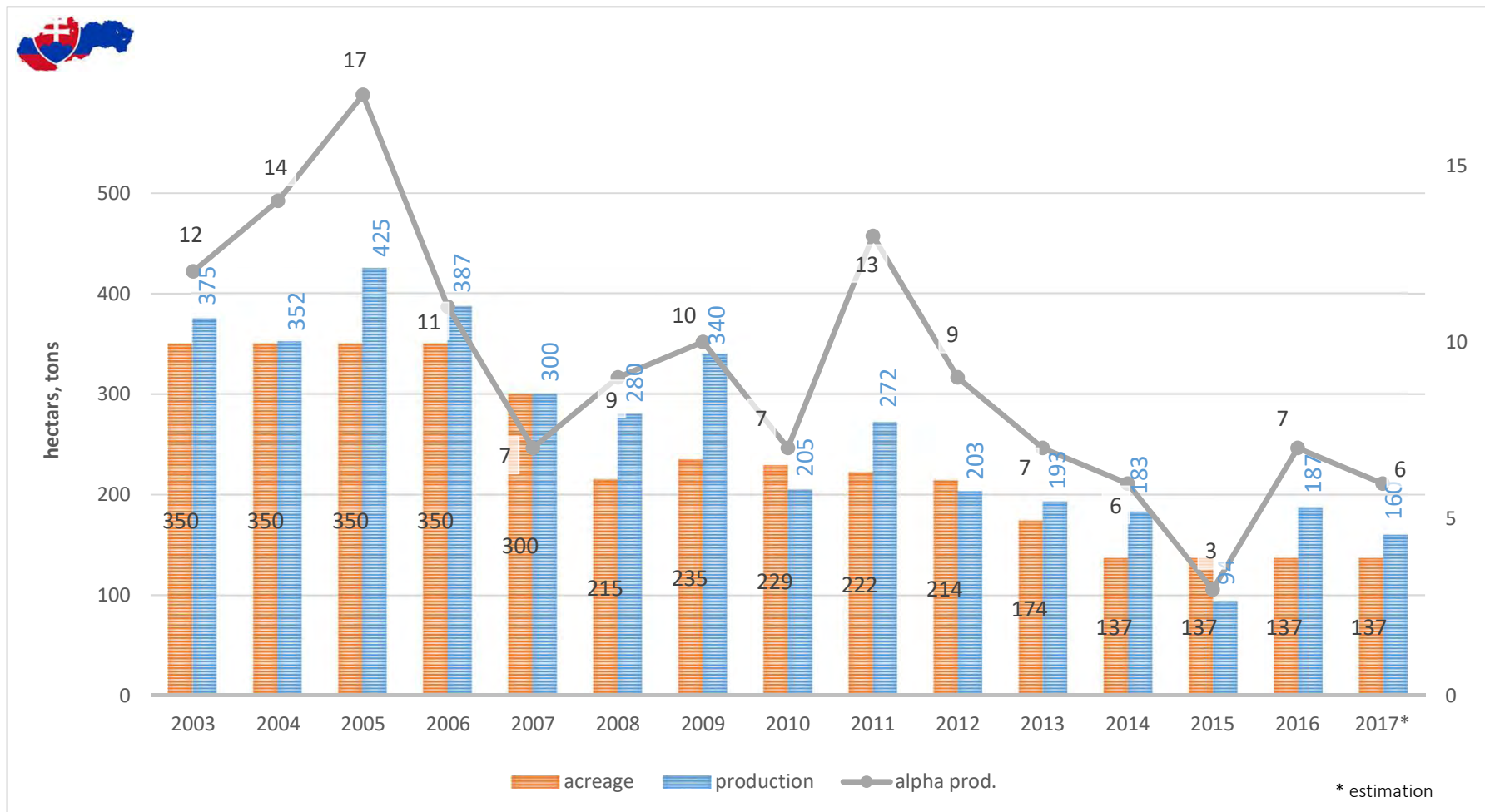
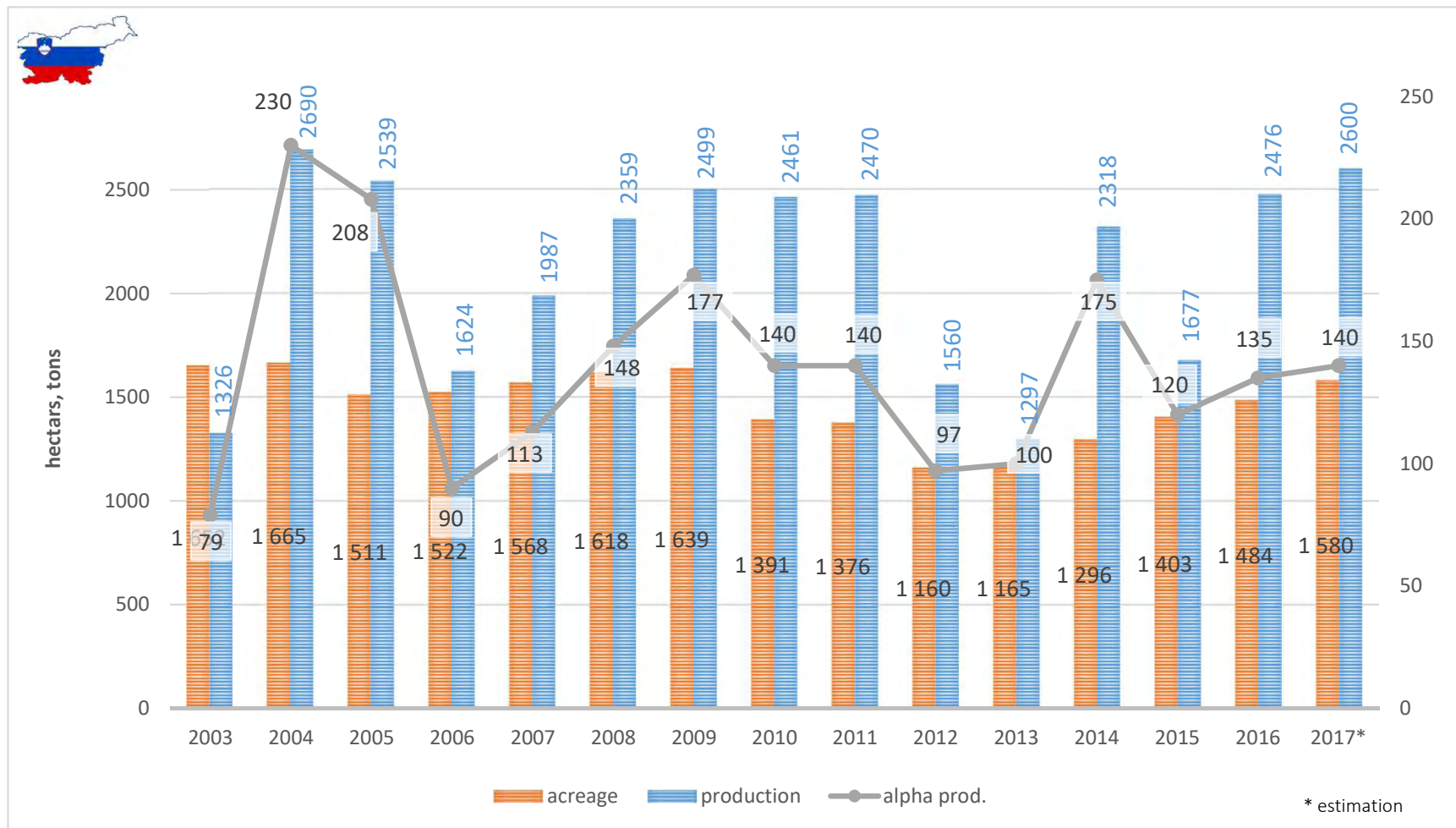




Figure 12: Slovakia hop crops 2003 - 2017\*



**Figure 13: Slovenia hop crops 2003 - 2017\***



**Figure 14: South Africa hop crops 2003 - 2017\***

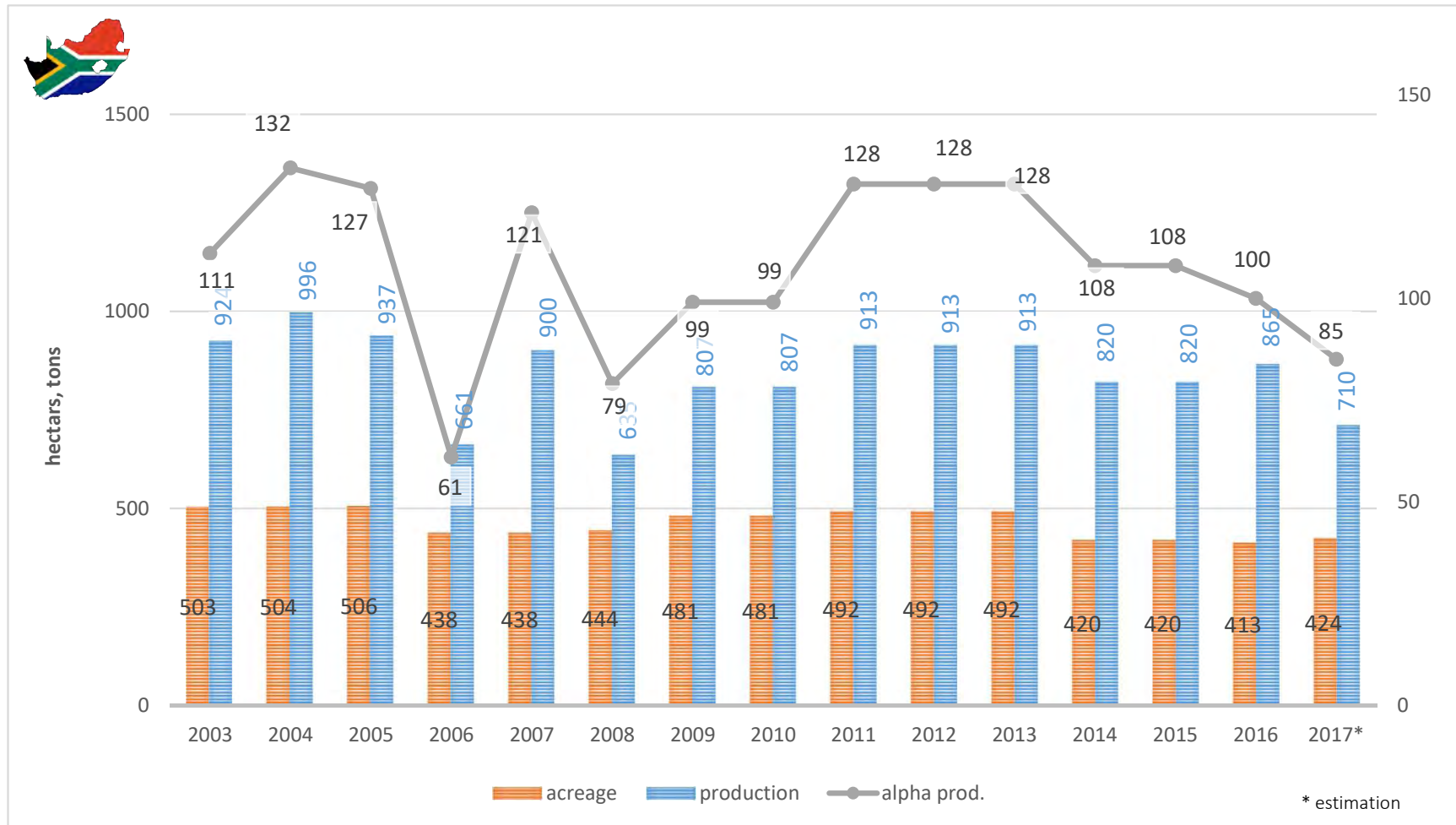


Figure 15: Spain hop crops 2003 - 2017\*

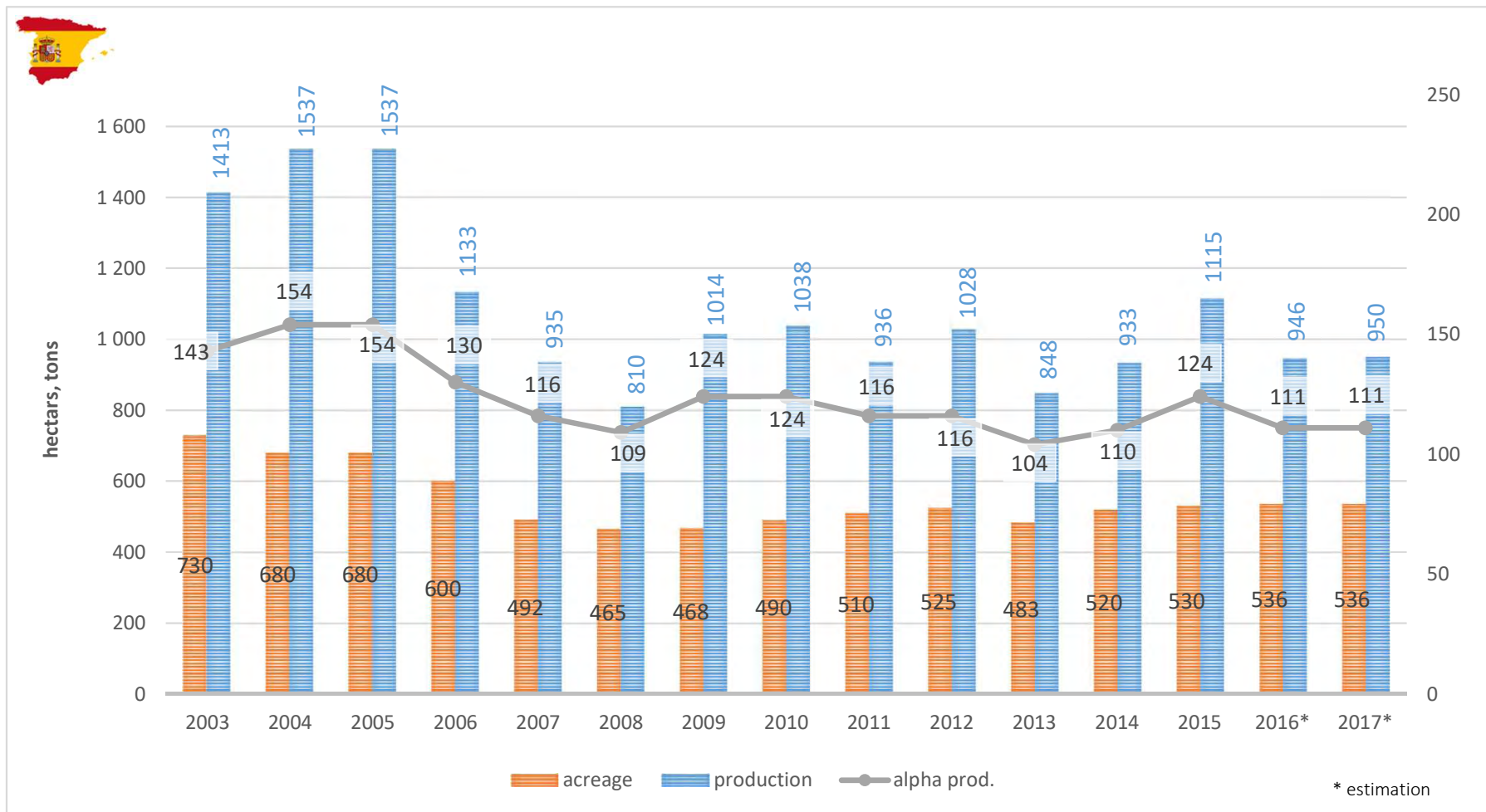




Figure 16: Ukraine hop crops 2003 - 2017\*

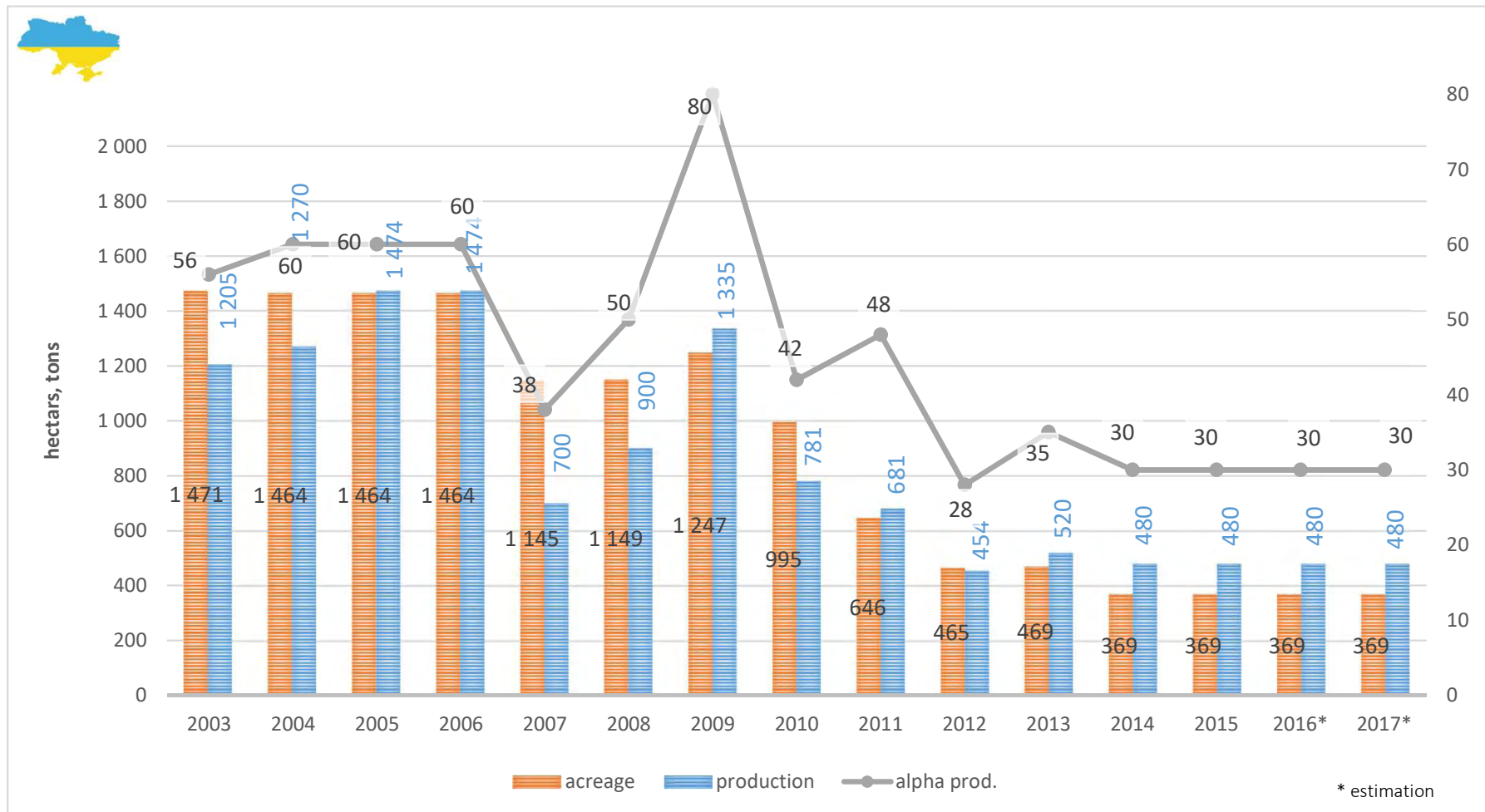
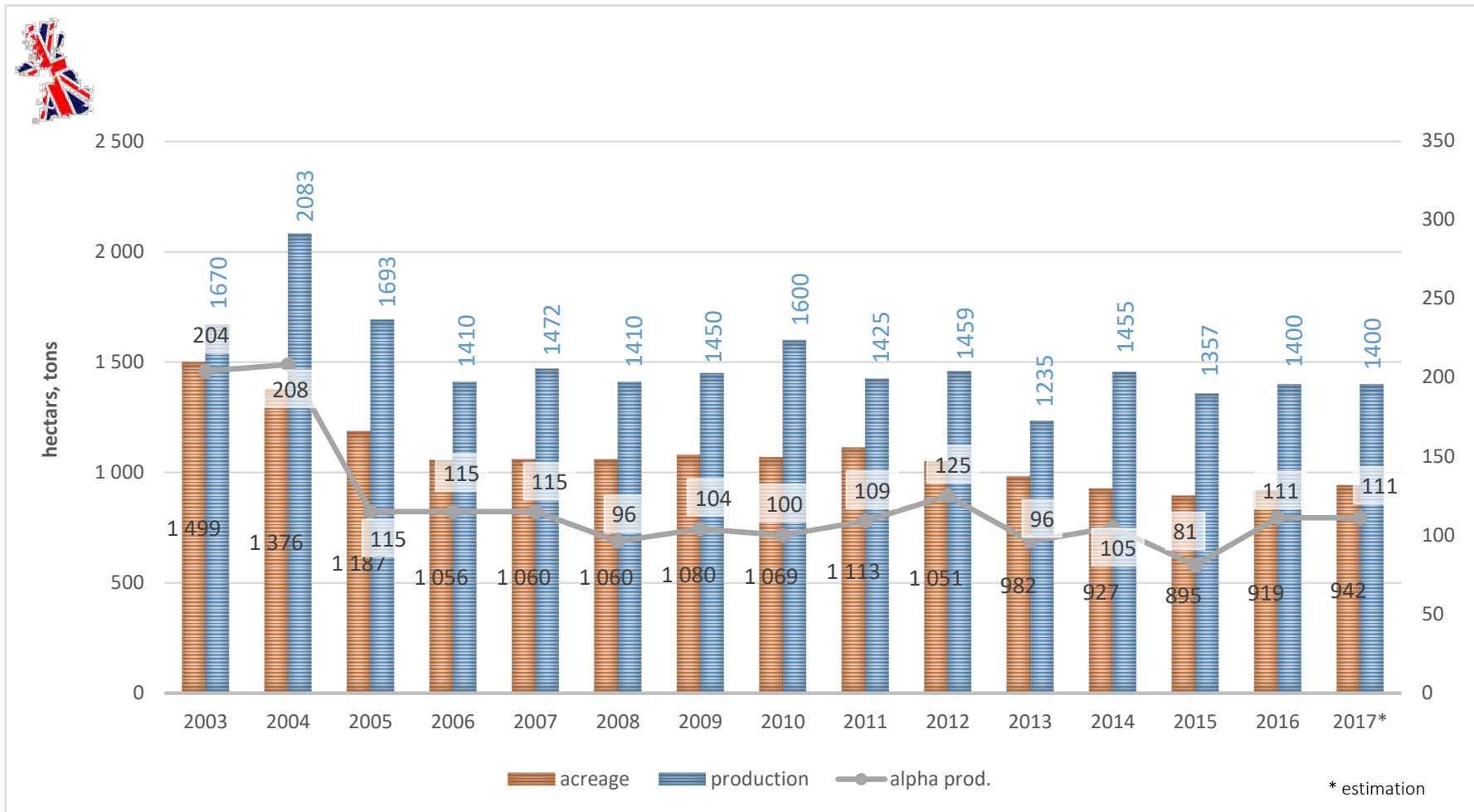


Figure 17: UK-England hop crops 2003 - 2017\*



**Figure 18: USA hop crops 2003 - 2017\***

