



2024 STATISTICAL REPORT

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PRESENTED BY HOP GROWERS OF AMERICA

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EDITOR'S NOTE:

The USDA National Agricultural Statistics Service annually distributes grower surveys to provide insight on acreage, production, yields, and pricing. In 2014, HGA began additionally releasing state-specific estimates of acreage and production in states outside of the Pacific Northwest. The recent contraction of acreage in these states has led to difficulty in accessing verifiable and accurate accounts on a state-specific basis. This year HGA enlisted self-reported production metrics from members and conducted additional data collection to estimate 955 hop acres outside of the Pacific Northwest yielding a total 1.1 million pounds in 2024. To become an individual grower member of Hop Growers of America and assist with estimating these figures, please visit usahops.org.

Conversions used while compiling the data presented in this document:

- 1 hectare = 2.4711 acres
- 1 acre = 0.404686 hectares
- 1 kilogram = 2.2046 pounds
- 1 pound = 0.4536 kilograms
- 1 metric tonne = 2204.6 pounds
- 1 hectoliter = 26.417 gallons
- 1 zentner = 110.23 pounds



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EXECUTIVE SUMMARY

In 2024 a striking long inventory of hops triggered widespread acreage reductions of 18% in the Pacific Northwest, eliminating over 9,500 acres from production. While the supply chain proved challenging, the natural affinities driving the U.S. to the helm of hop production enabled producers to deliver average yields of 1,944 pounds per acre in the Northwest and deliver a harvest of 87.1 million pounds.

In 2011, 29,787 acres of hops were harvested in the United States. By 2021, demand had doubled, propelling acreage to the heights of 60,872. In three short years, roughly half of this expansion has been removed. Invoking serious measures addressing the surplus, this year the Pacific Northwest removed over 9,500 acres from production, with 97% of the evaporated acreage dedicated to aroma varieties.

In the past two years the acreage of Citra® HBC 394, which alone commanded 20% of acreage in 2022, has been split almost in half, and Mosaic® HBC 369 dropped 44% in the same period. Citra® HBC 394 remains dominant with 6,775 harvested acres and Mosaic® HBC 369 remains in third place with 3,607 acres. This year a nearly 32% cut to Cascade shifted the variety to 5th place with 3,082 acres while Simcoe® YCR 14, embodying an 18% decrease with a total of 3,417 acres slid into 4th place. CTZ affirmed second place with 5,438 acres and newcomer super high alpha Helios™ climbed to 9th place.

U.S. production dropped 16% to 87.1 million pounds. Washington production represented 74% of the Pacific Northwest production, followed by Idaho with 15% and Oregon with 11%.

TOP 10 HOP VARIETIES (WITH ACREAGE)

	2019	2020	2021	2022	2023	2024
1	Citra®, HBC 394 (9,035)	Citra®, HBC 394 (10,997)	Citra®, HBC 394 (11,981)	Citra®, HBC 394 (12,044)	Citra®, HBC 394 (8,856)	Citra®, HBC 394 (6,775)
2	CTZ (6,539)	CTZ (6,286)	Mosaic®, HBC 369 (6,417)	Mosaic®, HBC 369 (6,501)	CTZ (6,354)	CTZ (5,438)
3	Cascade (5,280)	Mosaic®, HBC 369 (5,496)	CTZ (5,569)	Cascade (5,107)	Mosaic®, HBC 369 (5,276)	Mosaic®, HBC 369 (3,607)
4	Simcoe®, YCR 14 (4,365)	Simcoe®, YCR 14 (4,113)	Cascade (4,328)	CTZ (4,518)	Cascade (4,484)	Simcoe®, YCR 14 (3,417)
5	Mosaic®, HBC 369 (4,225)	Cascade (4,038)	Simcoe®, YCR 14 (4,007)	Simcoe®, YCR 14 (4,462)	Simcoe®, YCR 14 (4,206)	Cascade (3,082)
6	Centennial (3,680)	Centennial (2,933)	Centennial (2,342)	Centennial (2,424)	Centennial (2,489)	Centennial (2,448)
7	Amarillo®, VGXP01 (2,369)	HBC 682 (2,208)	HBC 682 (2,114)	Chinook (2,075)	HBC 682 (2,226)	HBC 682 (2,429)
8	Chinook (2,368)	Amarillo®, VGXP01 (2,149)	Amarillo®, VGXP01 (1,907)	Amarillo®, VGXP01 (1,913)	Amarillo®, VGXP01 (2,177)	Amarillo®, VGXP01 (2,015)
9	HBC 682 (2,150)	Chinook (1,893)	Chinook (1,774)	HBC 682 (1,709)	Chinook (1,701)	Helios™, HS15619 (1,890)
10	Summit (1,072)	EI Dorado® (1,584)	EI Dorado® (1,734)	EI Dorado® (1,165)	Helios™, HS15619 (1,509)	Chinook (1,260)
	Top Ten 41,083	Top Ten 41,697	Top Ten 42,173	Top Ten 41,918	Top Ten 39,278	Top Ten 32,361
	Other 15,461	Other 16,944	Other 18,699	Other 17,867	Other 16,432	Other 12,432
	Total 56,544	Total 58,641	Total 60,872	Total 59,785	Total 55,710	Total 44,793
	Top Ten 72.65%	Top Ten 71.1%	Top Ten 69.3%	Top Ten 70.1%	Top Ten 70.5%	Top Ten 72.2%

Year	Acres Harvested	Production (pounds)	Yield	Value of Production (\$1,000)	Gross Return per acre*
2017	53,989	105,621,500	1,959	\$591,375	\$10,954
2018	55,035	106,906,700	1,943	\$583,444	\$10,601
2019	56,544	112,041,200	1,981	\$636,580	\$11,258
2020	58,641	103,810,300	1,770	\$619,424	\$10,563
2021	60,872	115,630,900	1,900	\$661,618	\$10,869
2022	60,113	101,286,300	1,694	\$621,098	\$10,332
2023	54,318	104,042,500	1,915	\$562,146	\$10,349
2024	44,793	87,072,200	1,944	\$445,805	\$9,953

Source: USDA-NASS, prepared by HGA.

Growers have faced substantial increases in the cost of production, driven by expansion of harvesting and production capacity to handle a doubling of acreage over the past 10 years, updating equipment, increased labor costs (including health care and other benefits), and inflation in the cost of production inputs. Administrative and operating costs associated with food safety, best practices compliance and other customer requirements have also increased.

Washington State University updated the Pacific Northwest Hop Cost of Production Study in 2020, estimating the annual cost of producing mature standard trellis hops under drip irrigation in the Pacific Northwest at \$13,588 per acre (including variable and fixed costs, depreciation, etc.) – see <https://www.usahops.org/growers/cost-of-production.html>.

U.S. HOP ACREAGE BY STATE AND VARIETY (FIVE YEARS)

STATE & VARIETY	ACRES HARVESTED					2023-2024	
	2020	2021	2022	2023	2024	% +/-	
IDAHO							
Amarillo®, VGXP01	538	380	379	537	514	-4.28%	
Apollo™	*	*	*	209	210	0.48%	
Cascade	407	479	845	699	324	-53.65%	
Cashmere	125	124	140	91	*		
Chinook	624	521	542	409	192	-53.06%	
Citra®, HBC 394	1,527	1,743	1,767	1,014	609	-39.94%	
Columbus/Tomahawk®/Zeus	1,457	1,046	520	1,059	811	-23.42%	
Comet	93	146	144	108	*		
El Dorado®	526	621	304	242	*		
Elani™, YQH1320	*	*	*	8	8	0.00%	
Eureka!™	*	332	419	525	374	-28.76%	
Hallertauer Mittelfrüher	159	159	159	159	160	0.63%	
Helios™, HS15619	*	*	*	503	511	1.59%	
Idaho 7®	564	592	382	290	243	-16.21%	
Mosaic®, HBC 369	1,186	1,380	1,440	1,120	495	-55.80%	
Mt. Rainier	*	84	85	66	*		
Northern Brewer	58	58	*	*	*		
Saaz	*	330	380	380	372	-2.11%	
Simcoe®, YCR 14	425	388	441	257	97	-62.26%	
Triumph	39	72	55	*	*		
Willamette	*	389	459	459	158	-65.58%	
Experimental	*	*	*	*	31		
Other Varieties	1,540	850	1,100	510	688	34.90%	
TOTAL IDAHO	9,268	9,694	9,561	8,645	5,797	-32.94%	
OREGON							
Amarillo®, VGXP01	216	193	210	204	227	11.27%	
Cascade	754	666	658	629	487	-22.58%	
Centennial	489	364	380	386	422	9.33%	
Chinook	86	79	90	76	62	-18.42%	
Citra®, HBC 394	1,327	1,472	1,691	1,528	1,260	-17.54%	
Crystal	*	159	191	240	228	-5.00%	
Golding	*	78	*	*	*		
Liberty	56	54	*	25	25	0.00%	
Mosaic®, HBC 369	595	844	901	847	653	-22.90%	
Mt. Hood	159	123	171	188	142	-24.47%	
Mt. Rainier	*	126	130	109	*		
Nugget	826	572	441	375	252	-32.80%	
Sabro®, HBC 438	74	225	119	*	*		
Simcoe®, YCR 14	474	499	527	466	447	-4.08%	
Sterling	58	58	35	30	45	50.00%	
Strata™, OR 91331	484	833	1,143	839	574	-31.59%	
Super Galena™	87	*	*	*	*		
Tahoma	*	*	*	104	*		

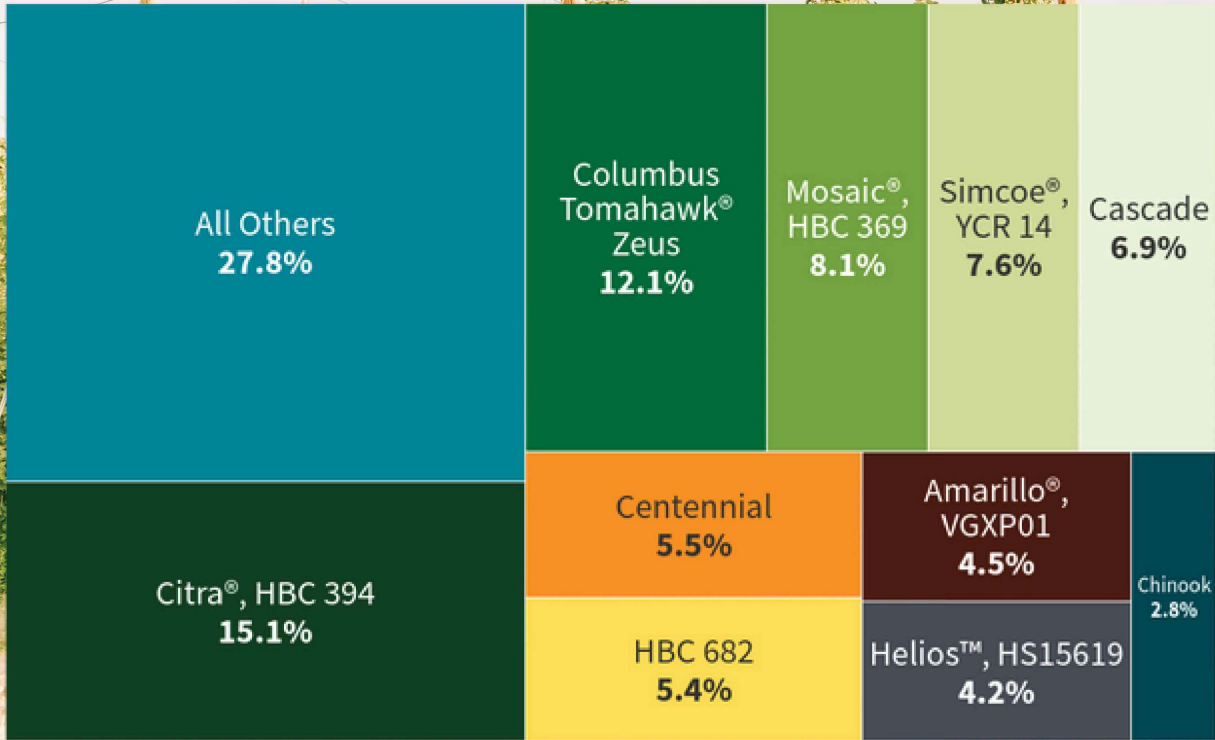
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STATE & VARIETY	ACRES HARVESTED					2023-2024
	2020	2021	2022	2023	2024	% +/-
OREGON CONTINUED						
Talus®, HBC 692	*	*	46	*	*	
Willamette	605	446	471	439	266	-39.41%
Other Varieties	814	604	586	337	545	61.72%
TOTAL OREGON	7,104	7,395	7,790	6,822	5,635	-17.40%
WASHINGTON						
Ahtanum®, YCR 1	230	166	168	*	*	
Amarillo®, VGXP01	1,395	1,334	1,324	1,436	1,274	-11.28%
Apollo™	750	*	807	802	870	8.48%
Azacca®, ADHA-483	722	730	871	401	367	-8.48%
Bravo™	201	238	203	206	143	-30.58%
Calypso™	115	*	*	*	*	
Cascade	2,877	3,183	3,604	3,156	2,271	-28.04%
Cashmere	448	690	717	258	140	-45.74%
Centennial	2,444	1,978	2,044	2,103	2,026	-3.66%
Chinook	1,183	1,174	1,443	1,216	1,006	-17.27%
Citra®, HBC 394	8,143	8,766	8,586	6,314	4,906	-22.30%
Cluster	413	390	286	195	270	38.46%
Columbus/Tomahawk®/Zeus	4,829	4,523	3,998	5,295	4,627	-12.62%
Comet	330	386	327	175	159	-9.14%
Ekuanot™, HBC 366	641	381	367	373	433	16.09%
El Dorado®	1,058	1,113	861	621	565	-9.02%
Elani™, YQH1320	*	*	*	61	58	-4.92%
Eureka!™	465	466	570	621	479	-22.87%
Galena	241	*	*	*	*	
HBC 682	2,208	2,114	1,709	2,226	2,429	9.12%
Helios™, HS15619	*	*	*	1,006	1,379	37.08%
Idaho 7®	341	388	158	148	150	1.35%
Jarrylo™, ADHA-881	17	*	*	*	*	
Loral®, HBC 291	164	197	199	161	106	-34.16%
Mosaic®, HBC 369	3,715	4,193	4,160	3,309	2,459	-25.69%
Mt. Hood	48	*	42	*	*	
Mt. Rainier	223	209	212	212	*	
Palisade®, YCR-4	246	333	377	260	315	21.15%
Pekko®, ADHA-871	801	1,070	1,084	1,045	*	
Sabro®, HBC 438	1,145	1,120	548	203	204	0.49%
Simcoe®, YCR 14	3,214	3,172	3,494	3,483	2,873	-17.51%
Summit™	640	437	*	*	*	
Super Galena™	475	480	354	354	355	0.28%
Tahoma	177	388	383	385	121	-68.57%
Talus®, HBC 692	*	*	377	147	95	-35.37%
Warrior®, YCR 5	283	128	147	148	147	-0.68%
Willamette	203	132	124	199	173	-13.07%
Zappa™	*	*	69	*	*	
Experimental	453	575	702	602	411	-31.73%
Other Varieties	1,431	3,329	2,447	1,730	2,550	47.40%
TOTAL WASHINGTON	42,269	43,783	42,762	38,851	33,361	-14.13%
TOTAL PACIFIC NORTHWEST	58,641	60,872	60,113	54,318	44,793	-17.54%

SOURCE: USDA-NASS. Prepared by HGA. State and variety acreage for production outside of the Pacific Northwest are not reported.

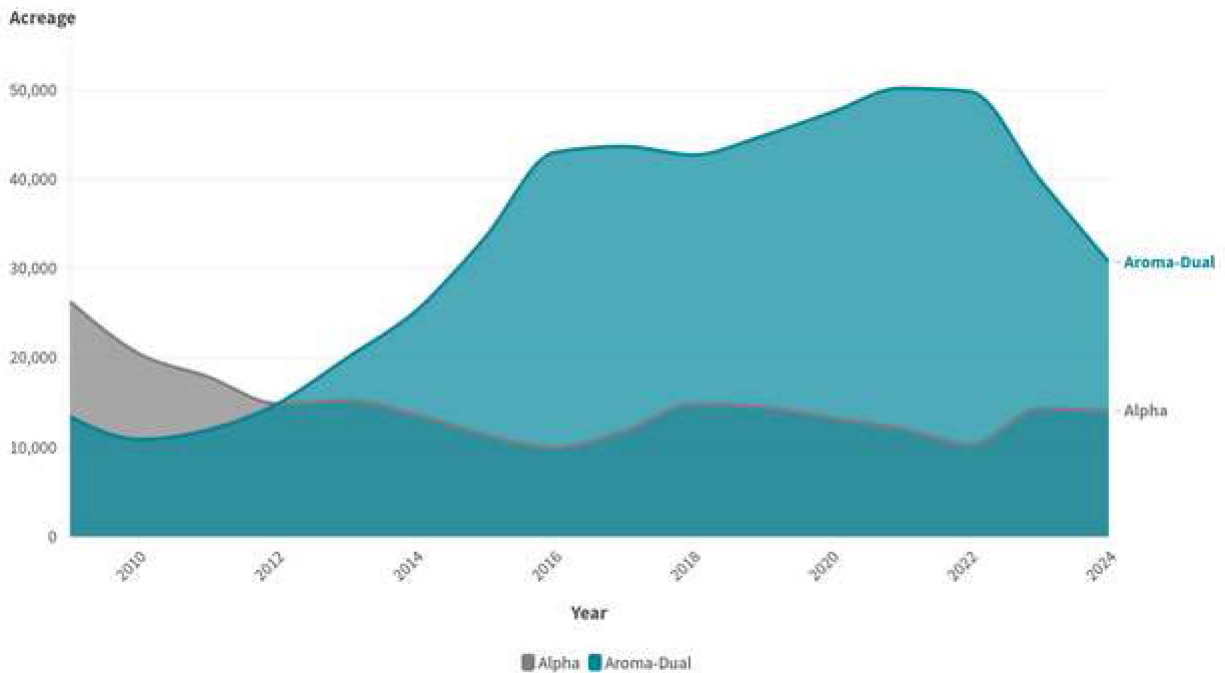
"Other Varieties" includes data to avoid disclosure of individual operations

MAJOR HOP VARIETIES – 2024 (% OF ACREAGE)



Source: USDA-NASS, prepared by HGA.

U.S. HOP ACREAGE – AROMA/DUAL PURPOSE VS. ALPHA

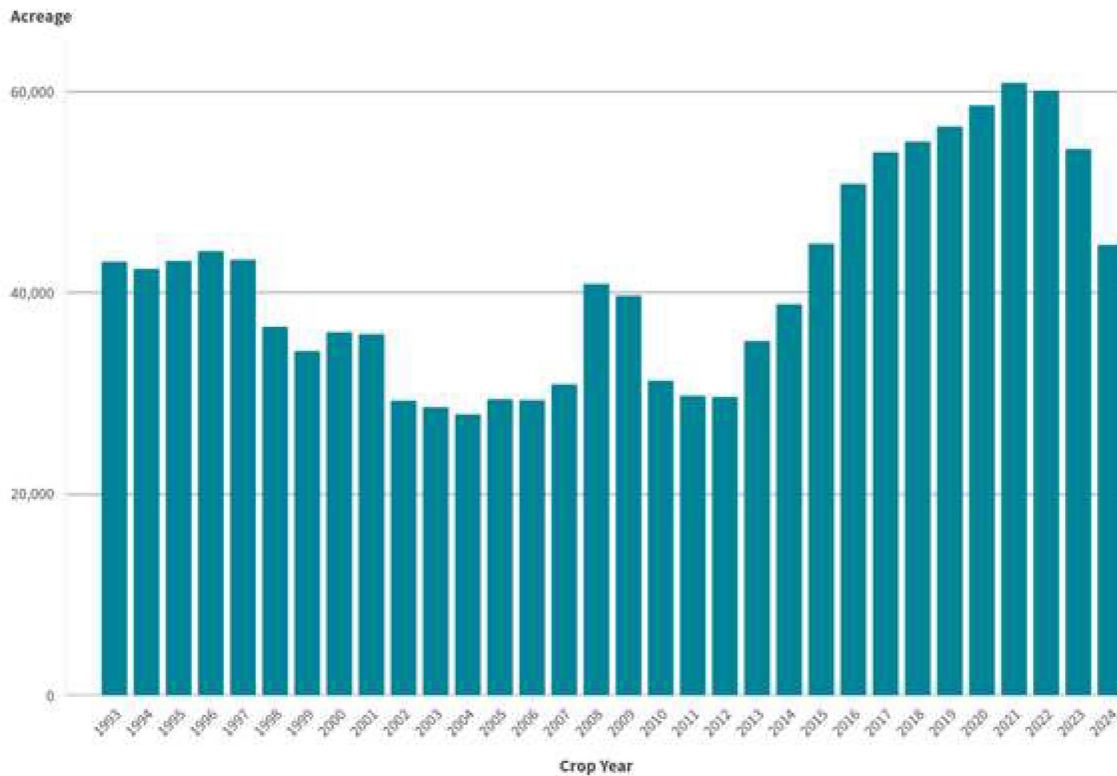


U.S. HOP ACREAGE BY STATE (10 YEARS)

YEAR	ACREAGE HARVESTED			TOTAL
	WASHINGTON	OREGON	IDAHO	
2015	32,158	6,612	4,863	43,633
2016	37,444	7,765	5,648	50,857
2017	38,648	8,216	7,125	53,989
2018	39,170	7,725	8,140	55,035
2019	40,880	7,306	8,358	56,544
2020	42,269	7,104	9,268	58,641
2021	43,783	7,395	9,694	60,872
2022	42,762	7,790	9,561	60,113
2023	38,851	6,822	8,645	54,318
2024	33,361	5,635	5,797	44,793

Source: USDA-NASS, prepared by HGA.

U.S. HOP ACREAGE (1993-2024)



SOURCE: USDA-NASS and HGA Hop Acreage Reports

HOP YIELDS BY STATE AND VARIETY (FIVE YEARS)

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2023-2024
	2020	2021	2022	2023	2024	% +/-
IDAHO						
Amarillo®, VGXP01	1,576	1,813	1,458	1,589	1,891	0.07%
Apollo™	2,305	*	*	2,744	2,709	0.04%
Bravo™	1,473	*	*	*	*	
Calypto™	1,966	*	*	*	*	
Cascade	1,213	1,559	1,494	1,957	2,136	0.06%
Cashmere	1,578	1,828	1,622	1,321	*	
Chinook	1,614	2,104	1,467	2,047	1,903	0.05%
Citra®, HBC 394	1,686	1,413	1,515	1,581	1,579	0.06%
Columbus/Tomahawk®/Zeus	2,673	3,169	3,027	2,638	3,336	0.05%
Comet	1,740	1,663	1,863	1,877	*	
El Dorado®	1,590	1,778	1,766	2,256	*	
Elani™, YQH1320	*	*	*	1,158	2,673	0.20%
Eureka!™	2,184	2,552	2,200	2,308	2,592	0.05%
Hallertauer Mittelfrüher	614	1,272	1,649	1,085	1,693	0.14%
Helios™, HSI5619	*	*	*	1,736	3,092	0.10%
Idaho 7®	2,442	2,837	2,588	2,572	2,680	0.04%
Mosaic®, HBC 369	2,335	2,141	2,103	2,442	2,644	0.04%
Mt. Rainier	*	985	1,364	1,572	*	
Northern Brewer	1,432	1,266	*	*	*	
Saaz	*	620	955	524	813	0.30%
Simcoe®, YCR 14	992	1,121	1,208	1,312	1,392	0.08%
Triumph	365	1,063	871	*	*	
Willamette	*	1,311	1,393	1,440	1,501	0.07%
Experimental	*	*	*	*	1,691	
Other Varieties	1,567	1,725	1,587	1,778	2,013	0.06%
Total Idaho	1,855	1,900	1,734	1,949	2,273	0.06%
OREGON						
Amarillo®, VGXP01	2,360	2,186	1,870	1,841	1,727	0.05%
Cascade	1,639	1,595	1,578	1,633	1,634	0.06%
Centennial	1,675	1,384	1,575	1,057	1,459	0.13%
Chinook	1,481	1,794	1,543	1,453	1,510	0.07%
Citra®, HBC 394	1,506	1,414	1,562	1,290	1,698	0.10%
Crystal	*	1,816	1,739	1,422	1,432	0.07%
Golding	*	927	*	*	*	
Liberty	2,289	1,506	*	835	1,233	0.18%
Mosaic®, HBC 369	2,155	2,077	2,059	1,907	2,203	0.06%
Mt. Hood	1,551	1,624	1,252	1,373	1,548	0.08%
Mt. Rainier	*	1,389	1,473	1,497	*	
Nugget	1,841	2,162	2,085	2,236	2,268	0.05%
Sabro®, HBC 438	870	1,749	1,996	*	*	
Simcoe®, YCR 14	1,823	1,643	1,646	1,225	1,337	0.09%
Sterling	1,728	1,321	1,559	1,859	1,451	0.04%
Strata™ OR 91331	2,068	1,889	2,000	1,617	1,961	0.07%
Super Galena™	2,801	*	*	*	*	
Tahoma	*	*	*	1,884	*	
Talus®, HBC 692	*	*	1,483	*	*	
Willamette	1,857	1,461	1,489	1,524	1,465	0.06%
Other Varieties	1,479	1,780	1,567	1,934	1,757	0.05%
Total Oregon	1,755	1,705	1,729	1,558	1,732	0.07%

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STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2023-2024
	2020	2021	2022	2023	2024	% +/-
WASHINGTON						
Ahtanum®, YCR 1	2,134	2,211	2,032	*	*	
Amarillo®, VGXP01	1,649	1,659	1,486	1,686	1,419	0.05%
Apollo™	2,248	*	2,483	2,989	2,682	0.03%
Azacca®, ADHA-483	1,527	1,909	1,559	1,980	2,020	0.05%
Bravo™	2,308	2,759	2,161	2,896	2,711	0.03%
Calypso™	2,437	2,930	*	*	*	
Cascade	1,551	1,585	1,477	1,957	1,839	0.05%
Cashmere	1,514	1,395	1,521	1,949	1,695	0.04%
Centennial	1,640	1,585	1,464	1,191	1,621	0.11%
Chinook	1,665	1,851	1,335	1,812	1,722	0.05%
Citra®, HBC 394	1,526	1,580	1,365	1,585	1,573	0.06%
Cluster	2,065	2,016	1,505	1,722	1,855	0.06%
Columbus/Tomahawk®/Zeus	2,176	2,656	2,256	2,465	2,496	0.04%
Comet	872	1,632	1,299	1,857	1,558	0.05%
Ekuanot®, HBC 366	2,158	2,608	2,153	2,335	2,021	0.04%
El Dorado®	1,516	1,876	1,685	2,093	1,580	0.04%
Elani™, YQH1320	*	*	*	2,403	2,247	0.04%
Eureka!™	2,332	3,022	2,205	3,028	3,119	0.03%
HBC 682	2,019	2,463	2,132	2,032	2,043	0.05%
Helios™, HSI5619	*	*	*	1,733	2,010	0.07%
Galena	1,838	*	*	*	*	
Idaho 7®	1,736	3,197	2,755	3,062	2,598	0.03%
Jarrylo™, ADHA-881	1,428	*	*	*	*	
Loral®, HBC 291	1,874	2,088	1,843	1,989	1,807	0.05%
Mosaic®, HBC 369	1,998	2,129	1,963	2,207	2,058	0.04%
Mt. Hood	1,139	*	573	*	*	
Mt. Rainier	1,586	1,635	1,563	2,031	*	
Palisade®, YCR-4	2,114	1,866	1,842	2,268	2,208	0.04%
Pekko®, ADHA-871	1,239	2,072	1,882	2,319	*	
Sabro®, HBC 438	1,886	2,207	2,052	3,034	2,397	0.03%
Simcoe®, YCR 14	1,643	1,646	1,380	1,539	1,527	0.06%
Summit™	1,096	1,351	*	*	*	
Super Galena™	2,636	2,849	2,838	2,970	2,921	0.03%
Tahoma	1,588	1,055	1,310	1,589	1,329	0.05%
Talus®, HBC 692	*	*	1,703	1,967	1,864	0.05%
Warrior®, YCR 5	1,669	2,240	1,610	2,070	1,723	0.04%
Willamette	1,458	1,200	991	971	1,320	0.14%
Zappa™	*	*	839	*	*	
Experimental	1,207	1,713	1,717	1,769	1,924	0.06%
Other Varieties	1,737	1,934	1,577	2,177	1,922	0.04%
Total Washington	1,754	1,932	1,694	1,915	1,944	0.05%
Total Pacific Northwest	1,770	1,900	1,694	1,915	1,944	0.05%

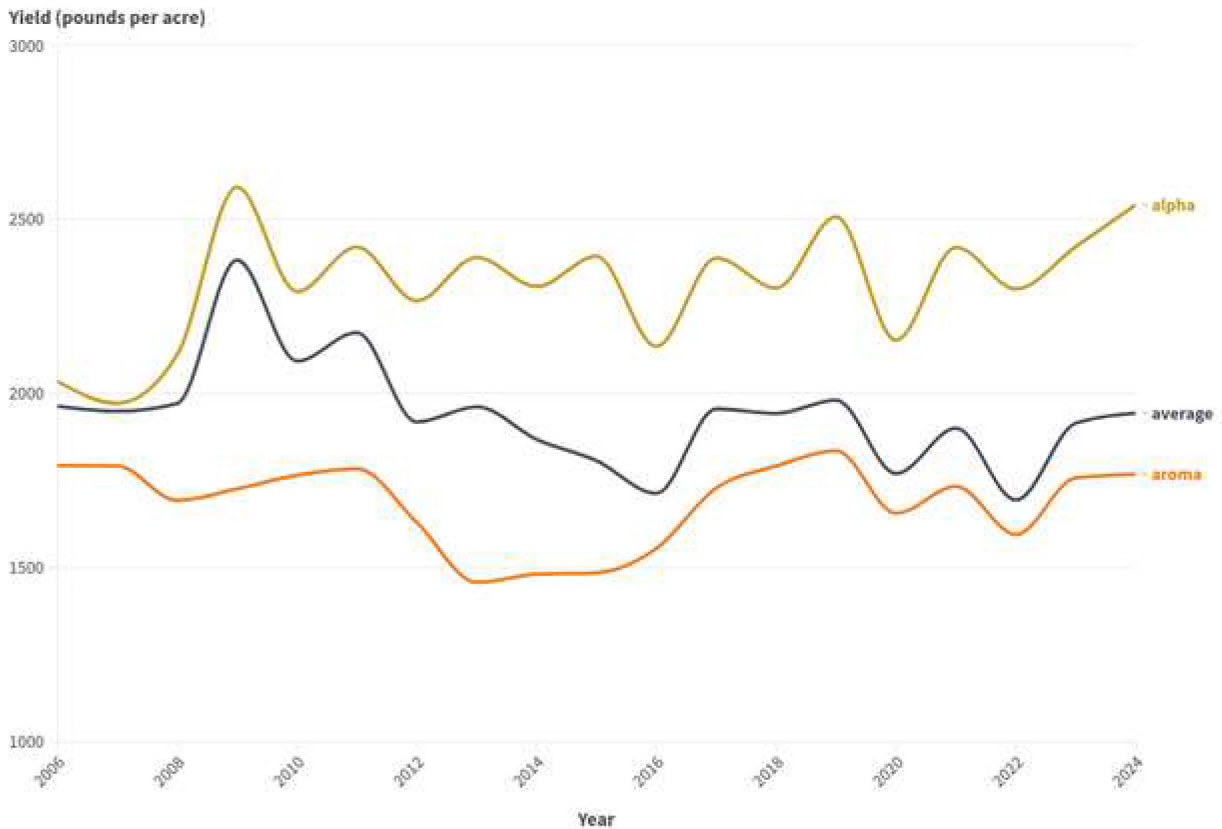
SOURCE: USDA-NASS. Prepared by HGA. State and variety yields for production outside of the Pacific Northwest are not reported. "Other Varieties" includes data to avoid disclosure of individual operations.

U.S. AVERAGE HOP YIELD (TEN YEARS)

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL
2015	1,849	1,613	1,794	1,807
2016	1,748	1,596	1,646	1,713
2017	2,046	1,518	1,974	1,956
2018	1,984	1,675	1,995	1,943
2019	2,006	1,783	2,034	1,981
2020	1,754	1,755	1,855	1,770
2021	1,932	1,705	1,900	1,900
2022	1,679	1,729	1,733	1,694
2023	1,971	1,558	1,949	1,915
2024	1,922	1,732	2,273	1,944

Source: USDA-NASS, prepared by HGA.

U.S. HOP YIELD – AROMA/DUAL PURPOSE VS. ALPHA



HOP PRODUCTION BY STATE AND VARIETY (FIVE YEARS)

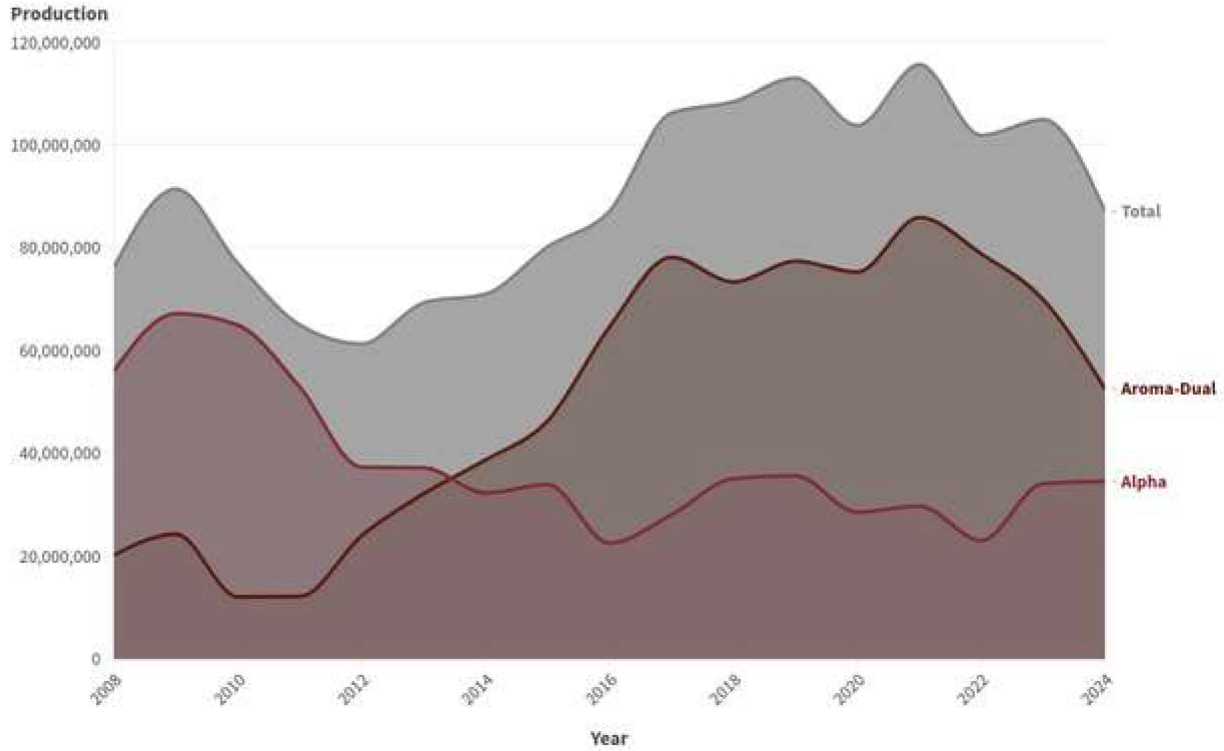
STATE & VARIETY	HOP PRODUCTION (POUNDS)					2023-2024
	2020	2021	2022	2023	2024	% +/-
IDAHO						
Amarillo®, VGXP01	847,900	688,900	552,600	853,300	972,000	13.91%
Apollo™	*	*	*	573,500	568,900	-0.80%
Cascade	493,700	746,800	1,262,400	1,367,900	692,100	-49.40%
Cashmere	197,300	226,700	227,100	120,200	*	
Chinook	1,007,100	1,096,200	795,100	837,200	365,400	-56.35%
Citra®, HBC 394	2,574,500	2,462,900	2,677,000	1,603,100	961,600	-40.02%
Columbus/Tomahawk®/Zeus	3,894,600	3,314,800	1,574,000	2,793,600	2,705,500	-3.15%
Comet	161,800	242,800	268,300	202,700	*	
El Dorado®	836,300	1,104,100	536,900	546,000	*	
Elani™, YQH1320	*	*	*	9,300	21,400	130.11%
Eureka!™	*	847,300	921,800	1,211,700	969,400	-20.00%
Hallertauer Mittelfrüher	97,600	202,200	262,200	172,500	270,900	57.04%
Helios™, HS15619	*	*	*	873,200	1,580,000	80.94%
Idaho 7®	1,377,300	1,679,500	988,600	745,900	651,200	-12.70%
Mosaic®, HBC 369	2,769,300	2,954,600	3,028,300	2,735,000	1,308,800	-52.15%
Mt. Rainier	*	82,700	115,900	103,800	*	
Northern Brewer	83,100	73,400	*	*	*	
Saaz	*	204,600	362,900	199,100	302,400	51.88%
Simcoe®, YCR 14	421,600	434,900	532,700	337,200	135,000	-59.96%
Triumph	14,200	76,500	47,900	*	*	
Willamette	*	510,000	639,400	661,000	237,200	-64.11%
Experimental	*	*	*	*	52,400	
Other Varieties	2,413,800	1,465,900	1,779,200	906,800	1,384,600	52.69%
Total Idaho	17,190,100	18,414,800	16,572,300	16,853,000	13,178,800	-21.80%
OREGON						
Amarillo® VGXP01	509,800	421,900	392,700	375,600	392,000	4.37%
Cascade	1,235,800	1,062,300	1,038,300	1,027,200	795,800	-22.53%
Centennial	819,100	503,800	598,500	408,000	615,700	50.91%
Chinook	127,400	141,700	138,900	110,400	93,600	-15.22%
Citra®, HBC 394	1,998,500	2,081,400	2,641,300	1,971,100	2,139,500	8.54%
Crystal	*	288,700	332,100	341,300	326,500	-4.34%
Golding	*	72,300	*	*	*	
Liberty	128,200	81,300	*	20,900	30,800	47.37%
Mosaic®, HBC 369	1,282,200	1,753,000	1,855,200	1,615,200	1,438,600	-10.93%
Mt. Hood	246,600	199,800	214,100	258,100	219,800	-14.84%
Mt. Rainier	*	175,000	191,500	163,200	*	
Nugget	1,520,700	1,236,700	919,500	838,500	571,500	-31.84%
Sabro®, HBC 438	64,400	393,500	237,500	*	*	
Simcoe®, YCR 14	864,100	819,900	867,400	570,900	597,600	4.68%
Sterling	100,200	76,600	54,600	55,800	65,300	17.03%
Strata™ OR 91331	1,000,900	1,573,500	2,286,000	1,356,700	1,125,600	-17.03%
Super Galena™	243,700	*	*	*	*	
Tahoma	*	*	*	195,900	*	
Talus®, HBC 692	*	*	68,200	*	*	
Willamette	1,123,500	651,600	701,300	669,000	389,700	-41.75%
Other Varieties	1,203,600	1,074,900	934,800	651,900	957,300	46.85%
Total Oregon	12,468,700	12,607,900	13,471,900	10,629,700	9,759,300	-8.19%

Continued on next page

STATE & VARIETY	HOP PRODUCTION (POUNDS)					2023-2024
	2020	2021	2022	2023	2024	% +/-
WASHINGTON						
Ahtanum®, YCR 1	490,800	367,000	341,400	*	*	
Amarillo®, VGXP01	2,300,400	2,213,100	1,967,500	2,421,100	1,807,800	-25.33%
Apollo™	1,686,000	*	2,003,800	2,397,200	2,333,300	-2.67%
Azacca®, ADHA-483	1,102,500	1,393,600	1,357,900	794,000	741,300	-6.64%
Bravo™	463,900	656,600	438,700	596,600	387,700	-35.02%
Calypso™	280,242	*	*	*	*	
Cascade	4,462,200	5,045,100	5,323,100	6,176,300	4,176,400	-32.38%
Cashmere	678,300	962,600	1,090,600	502,800	237,300	-52.80%
Centennial	4,008,200	3,135,100	2,992,400	2,504,700	3,284,100	31.12%
Chinook	1,969,700	2,173,100	1,926,400	2,203,400	1,732,300	-21.38%
Citra®, HBC 394	12,426,200	13,850,300	11,719,900	10,007,700	7,717,100	-22.89%
Cluster	852,800	786,200	430,400	335,800	500,900	49.17%
Columbus/Tomahawk®/Zeus	10,507,900	12,013,100	9,019,500	13,052,200	11,549,000	-11.52%
Comet	287,800	630,000	424,800	325,000	247,700	-23.78%
Ekuanot®, HBC 366	1,383,300	993,600	790,200	871,000	875,100	0.47%
El Dorado®	1,603,900	2,088,000	1,450,800	1,299,800	892,700	-31.32%
Elani™, YQH1320	*	*	*	146,600	130,300	-11.12%
Eureka!™	1,084,400	1,408,300	1,256,900	1,880,400	1,494,000	-20.55%
HBC 682	4,458,000	5,206,800	3,643,600	4,523,200	4,962,400	9.71%
Helios™, HS15619	*	*	*	1,743,400	2,771,800	58.99%
Galena	443,000	*	*	*	*	
Idaho 7®	592,000	1,240,400	435,300	453,200	389,700	-14.01%
Jarrylo™, ADHA-881	24,300	*	*	*	*	
Loral®, HBC 291	307,300	411,300	366,800	320,200	191,500	-40.19%
Mosaic®, HBC 369	7,422,600	8,926,900	8,166,100	7,303,000	5,060,600	-30.71%
Mt. Hood	54,700	*	24,100	*	*	
Mt. Rainier	353,700	341,700	331,400	430,600	*	
Palisade®, YCR-4	520,000	621,400	694,400	589,700	695,500	17.94%
Pekko®, ADHA-871	992,400	2,217,000	2,040,100	2,423,400	*	
Sabro®, HBC 438	2,159,500	2,471,800	1,124,500	615,900	489,000	-20.60%
Simcoe®, YCR 14	5,280,600	5,221,100	4,821,700	5,360,300	4,387,100	-18.16%
Summit™	701,400	590,400	*	*	*	
Super Galena™	1,252,100	1,367,500	1,004,700	1,051,400	1,037,000	-1.37%
Tahoma	281,100	409,300	501,700	611,800	160,800	-73.72%
Talus®, HBC 692	*	*	642,000	289,100	177,100	-38.74%
Warrior®, YCR 5	472,300	286,700	236,700	306,400	253,300	-17.33%
Willamette	296,000	158,400	122,900	193,200	228,400	18.22%
Zappa™	*	*	57,900	*	*	
Experimental	546,800	985,000	1,205,300	1,064,900	790,800	-25.74%
Other Varieties	2,405,158	6,436,800	3,858,000	3,765,500	4,432,100	17.70%
Total Washington	74,151,500	84,608,200	71,811,500	76,559,800	64,134,100	-16.23%
Total Pacific Northwest	103,810,300	115,630,900	101,855,700	104,042,500	87,072,200	-16.31%

SOURCE: USDA-NASS. Prepared by HGA. State and variety production outside of the Pacific Northwest are not reported. "Other Varieties" includes data to avoid disclosure of individual operations

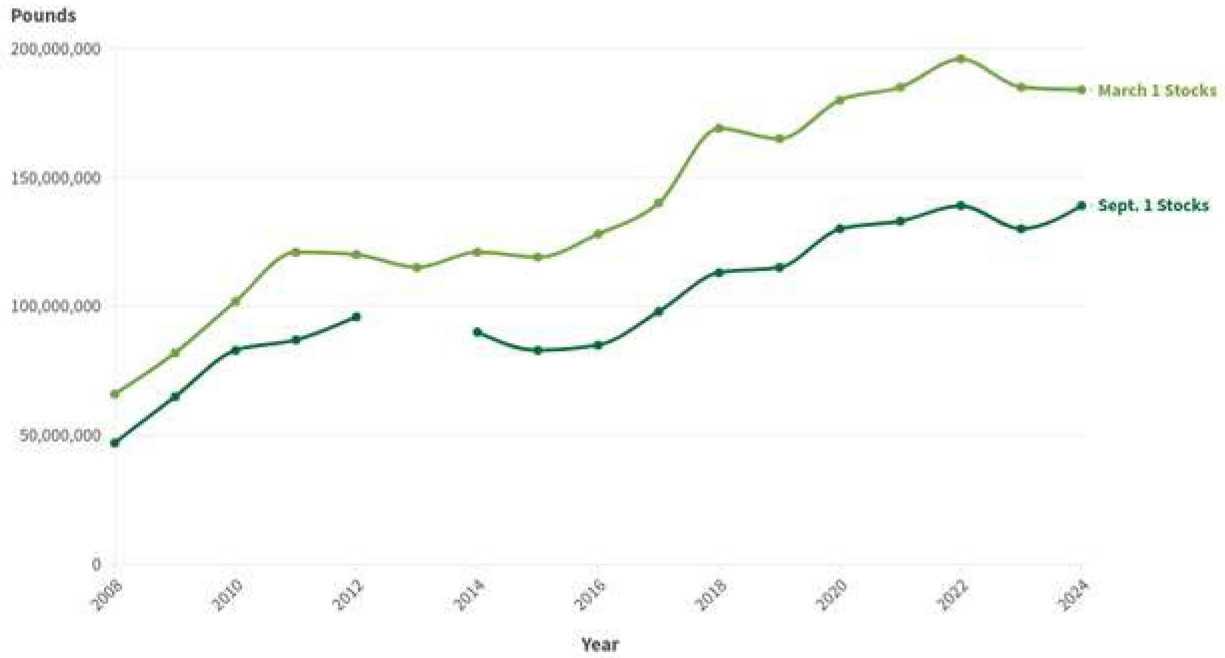
U.S. HOP PRODUCTION – ALPHA VS. AROMA POUNDS OF PRODUCTION



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

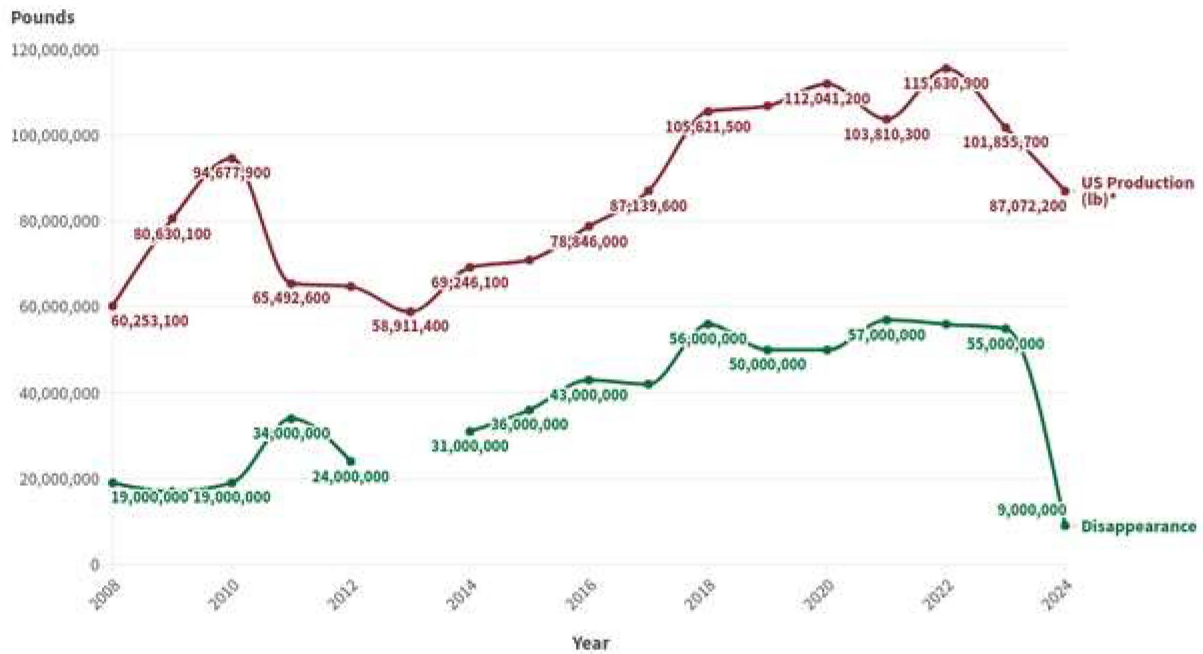
Marketing Year	SEASON AVERAGE PRICE				U.S.	Total Crop
	Washington	Oregon	Idaho	U.S.	Production	Value
	----- (\$ / pound) -----				(Lbs. x 1,000)	(x 1,000)
2013	\$3.37	\$3.76	\$2.62	\$3.35	69,246	\$232,308
2014	\$3.73	\$4.07	\$2.72	\$3.67	70,995	\$260,627
2015	\$4.71	\$3.24	\$3.53	\$4.38	78,846	\$345,388
2016	\$5.84	\$5.25	\$5.50	\$5.72	87,140	\$498,420
2017	\$5.80	\$5.00	\$5.00	\$5.60	105,622	\$591,375
2018	\$5.50	\$5.40	\$5.30	\$5.46	106,907	\$583,444
2019	\$5.80	\$5.50	\$5.25	\$5.68	112,041	\$636,580
2020	\$6.00	\$6.00	\$5.80	\$5.97	103,810	\$619,424
2021	\$5.70	\$5.90	\$5.70	\$5.72	115,631	\$661,618
2022	\$6.05	\$6.35	\$6.10	\$6.10	101,856	\$621,098
2023	\$5.30	\$6.15	\$5.40	\$5.40	104,043	\$562,146
2024	\$5.00	\$5.80	\$5.20	\$5.12	87,072	\$445,805

U.S. HOP STOCKS



SOURCE: USDA-NASS. Due to Federal funding cuts the September 2012 Hop Stocks survey was not conducted.

PRODUCTION (POUNDS) VS. MARCH TO SEPTEMBER STOCKS DISAPPEARANCE



SOURCE: USDA-NASS. Prepared by HGA. Due to Federal funding cuts the September 2012 Hop Stocks survey was not conducted.

2024 HOP INSPECTION REPORT

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
2020	377,543	61,291	86,619	525,453
2021	436,042	62,643	90,994	589,679
2022	361,305	68,284	78,803	508,392
2023	372,093	52,805	83,073	507,971
2024	316,998	47,044	58,527	422,569

TABLE 1. Total Number of Bales Inspected.

State	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL	AVERAGE
WA	274,743	36,716	4,712	625	202	0	0	0	316,998	0.15%
OR	38,290	8,528	220	6	0	0	0	0	47,044	0.19%
ID	55,912	2,574	41	0	0	0	0	0	58,527	0.05%
Total	368,945	47,818	4,973	631	202	0	0	0	422,569	0.14%
% of Total	87%	11%	1%	0%	0%	0%	0%	0%	100%	

TABLE 2. Number of Bales in Each Leaf & Stem Category – 2024

State	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL	AVERAGE
WA	268,875	30,759	9,563	4,859	1,512	449	474	507	316,998	0.25%
OR	36,501	8,513	1,157	501	326	0	0	46	47,044	0.30%
ID	58,347	0	0	180	0	0	0	0	58,527	0.01%
Total	363,723	39,272	10,720	5,540	1,838	449	474	553	422,569	0.22%
% of Total	86%	9%	3%	1%	0%	0%	0%	0%	100%	

TABLE 3. Number of Bales in Each Seed Category – 2024

SOURCE: State Hop Inspection Labs. Prepared by HGA.

U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE (10 YEARS)

Year	WASHINGTON Leaf & Stem	OREGON Leaf & Stem	IDAHO Leaf & Stem	U.S. AVERAGE %	
				Leaf & Stem	Seed Content
2016	0.33%	0.31%	0.19%	0.31%	1.31%
2017	0.26%	0.50%	0.46%	0.32%	0.87%
2018	0.37%	0.16%	0.78%	0.41%	0.48%
2019	0.29%	0.39%	0.38%	0.37%	1.19%
2020	0.27%	0.04%	0.58%	0.30%	0.67%
2021	0.38%	0.09%	0.65%	0.39%	0.97%
2022	0.17%	0.05%	0.30%	0.17%	0.19%
2023	0.24%	0.08%	0.25%	0.22%	0.33%
2024	0.15%	0.19%	0.05%	0.14%	0.22%

SOURCE: State Hop Inspection Labs. Prepared by HGA.

2024 US-GROWN HOP VARIETY CODES (INTERNATIONALLY HARMONIZED)

Brand/Variety	Code	Brand/Variety	Code	Brand/Variety	Code
Adeena™ (ADHA-1940)	ADA	Eureka!™	EUE	Pink	PNK
Ahhhroma™	AHH	Experimental	EXP	Saaz	SAZ
Ahtanum® Brand YCR 1	AHT	Fuggie	FUG	Sabro™ Brand HBC 438	SAB
Alpharoma	AAA	Galena	GAL	Santiam	SNT
Altus™	ATS	Glacier	GLC	Satus®, YCR 7	SAT
Amarillo®, VGXP01	VG1	Golding	GOL	Serebrianka	SEK
Anchovy	ANC	Hallertauer Mittelfruher	HAL	Simcoe® Brand YCR 14	SIM
Apollo™	APO	Hallertauer Magnum	HMG	Sonnet™	SON
Aquila	AQU	Helios™ (EXP15619)	HLO	Sorachi Ace	SOR
Azacca®, ADHA-483	AZA	Horizon	HOR	Spalter	SPA
Banner	BAN	Idaho7®	ID7	Sterling	STR
Belma®	BEL	Idaho Gem™	IDG	Strata™, OR91331	STT
Bitter Gold	BIG	Jarrylo®, ADHA-881	JAR	Strissel Spalt	FSP
Bravo™	BRO	Krush™, Brand HBC 586	KRU	Summit™	SUM
Brewers Gold	BGO	Lemondrop™	LDP	Sultana™ (06277, formerly Denali™)	SUL
BRU-1™	BR1	Liberty	LIB	Super Galena™	SGA
Bullion	BUL	Loral® Brand HBC 291	LOR	Tahoma	TAH
Calypso™	CPO	Lórien®, IH101033	LRN	Talisman	TLN
Cascade	CAS	Lotus™	LOT	Talus™ HBC 692 c.v.	TAL
Cashmere	CMR	Luminosa®	LUM	Tangier™	TGR
Centennial	CEN	Medusa™	MED	Teamaker	TMK
Chelan	CHE	Meridian	MER	Tettninger	TET
Chinook	CHI	McKenzie™	MKZ	Tillicum®	TIL
Citra® Brand HBC 394	CIT	Millennium	MLM	Tomahawk®, F10	TOM
Cluster	CLU	Mosaic® Brand HBC 369	MOS	Topaz™	TOP
Columbia	CBA	Mt. Hood	MTH	TriplePearl	TRP
Columbus	CBS	Mt. Rainier	MTR	Triumph	TRI
Columbus/Tomahawk®/Zeus (CTZ)	CTZ	Newport	NWP	Ultra	ULT
Comet	COM	Northern Brewer	NBR	Vanguard	VAN
Contessa™	CTA	Nugget	NUG	Vista	VTA
Crystal	CRY	Olympic	OLC	Warrior® Brand YCR 5	WAR
Delta™	DEL	Other	OTH	Willamette	WIL
Ekuanot® Brand HBC 366	EKU	HBC 682 (formerly Pahto™)	PAH	Yakima Gold	YKG
El Dorado®	ELD	Palisade® Brand YCR 4	PAL	Elani™, YQH1320	Y20
Erebus™	ERS	Pekko®, ADHA-871	PEK	Zappa™	ZAP
Eroica	ERO	Perle	PER	Zeus	ZEU
				Zumo™	ZMO

Hop variety codes are internationally harmonized through a collaborative effort managed by the International Hop Growers Convention (IHGC) Scientific Commission.

For a complete list of IHGC varieties, please visit HGA's website at www.usahops.org/growers/industry-standards.html.

IHGC AROMA ACREAGE (FIVE YEARS)

COUNTRY	AROMA ACREAGE (IN ACRES)					2023-2024
	2020	2021	2022	2023	2024	% +/-
Argentina	314	324	324	324	324	0.00%
Australia	1,354	1,460	1,675	1,965	1604	-18.36%
Austria	487	487	494	509	514	0.97%
Belgium	306	306	306	311	309	-0.79%
Brazil	*	*	62	62	62	0.00%
Bulgaria	44	44	44	44	57	27.78%
Canada	494	494	494	494	494	0.00%
China	890	890	699	699	741	6.01%
Czech Rep.	11,454	11,419	11,434	11,288	11298	0.09%
France	1,021	1,107	1,114	1,107	1369	23.66%
Germany	27,115	26,384	26,073	25,299	23471	-7.23%
Great Britain	1,757	1,310	1,265	1,072	1058	-1.38%
Italy	*	*	*	*	35	
Japan	131	131	131	131	96	-26.42%
New Zealand	1,478	1,478	2,471	2,471	2471	0.00%
Poland	1,606	1,515	2,071	2,100	1868	-11.06%
Romania	185	180	180	180	180	0.00%
Russia	415	415	247	259	321	23.81%
Serbia	20	20	20	27	30	0.00%
Slovakia	94	94	94	94	94	0.00%
Slovenia	3,410	3,477	3,595	3,726	3840	3.05%
South Africa	180	230	210	205	215	4.82%
Spain	0	15	20	20	25	25.00%
Ukraine	764	764	247	247	247	0.00%
USA	47,456	50,148	49,779	39,976	30,711	-23.18%
IHGC Total	100,975	102,691	103,051	92,613	81,433	-12.07%

SOURCE: IHGC Economic Commission November report. US hop acreage is updated to reflect the USDA-NASS 2024 National Hop Report. Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC ALPHA ACREAGE (FIVE YEARS)

COUNTRY	ALPHA ACREAGE (IN ACRES)					2023-2024
	2020	2021	2022	2023	2024	% +/-
Argentina	146	116	116	116	116	0.00%
Australia	376	269	269	269	269	0.00%
Austria	143	143	141	141	143	1.75%
Belgium	143	143	143	146	128	-11.86%
Brazil	*	*	62	62	62	0.00%
Bulgaria	37	37	37	37	47	26.67%
Canada	371	371	371	371	371	0.00%
China	4,942	4,942	5,291	5,291	5,931	12.10%
Czech Rep.	151	151	138	198	190	-3.75%
France	119	124	131	190	138	-27.27%
Germany	22,620	22,915	23,616	24,056	24,775	2.99%
Great Britain	388	346	339	299	267	-10.74%
Italy	*	*	*	*	5	
Japan	131	131	131	131	96	-26.42%
New Zealand	358	358	988	988	988	0.00%
Poland	2,661	2,829	2,041	2,170	2,113	-2.62%
Romania	465	472	479	489	512	4.55%
Russia	183	183	64	74	111	50.00%
Serbia	0	0	0	0	0	0.00%
Slovakia	0	0	0	0	0	0.00%
Slovenia	57	59	62	47	44	-5.26%
South Africa	875	783	801	803	783	-2.46%
Spain	1,155	1,386	1,386	1,374	1,389	1.08%
Ukraine	148	148	124	124	124	0.00%
USA	13,262	12,111	10,334	14,342	14,082	-1.81%
IHGC Total	48,731	48,019	47,363	51,915	52,686	1.48%

SOURCE: IHGC Economic Commission November report. US hop acreage is updated to reflect the USDA-NASS 2024 National Hop Report. Numbers may not total exactly due to rounding and standard/metric conversions.



IHGC TOTAL ACREAGE (5 YEARS)

COUNTRY	TOTAL ACREAGE (IN ACRES)					2023-2024
	2020	2021	2022	2023	2024	% +/-
Argentina	460	440	440	440	440	0.00%
Australia	1,730	1,730	1,945	2,234	1,873	-16.15%
Austria	630	630	635	650	667	2.66%
Belgium	450	450	450	457	437	-4.32%
Brazil	*	*	124	124	131	6.00%
Bulgaria	82	82	82	82	104	27.27%
Canada	865	865	865	865	865	0.00%
China	5,832	5,832	5,990	5,990	6,672	11.39%
Czech Rep.	11,604	11,570	11,572	11,486	11,972	4.24%
France	1,139	1,231	1,245	1,297	1,792	38.10%
Germany	49,736	49,298	49,689	49,355	50,136	1.58%
Great Britain	2,145	1,656	1,604	1,371	1,325	-3.42%
Italy	*	*	*	*	49	
Japan	262	262	262	262	193	-26.42%
New Zealand	1,836	1,836	3,460	3,460	3,460	0.00%
Poland	4,268	4,344	4,112	4,270	4,082	-4.40%
Romania	650	652	660	670	692	3.32%
Russia	598	598	311	334	754	125.93%
Serbia	20	20	20	27	30	9.09%
Slovakia	94	94	94	94	94	0.00%
Slovenia	3,467	3,536	3,657	3,773	4,062	7.66%
South Africa	1,055	1,013	1,011	1,008	998	-0.98%
Spain	1,156	1,401	1,406	1,394	1,458	4.61%
Ukraine	912	912	371	371	371	0.00%
USA	58,641	60,872	60,113	54,318	44,793	-17.54%
IHGC Total	147,630	149,323	150,115	144,330	137,449	-4.77%

Note: Totals may not match the sum of aroma and alpha acreage presented in preceding charts due to inclusion of new acreage not strung for harvest in the IHGC Total Acreage figures.

IHGC HOP ACREAGE & PRODUCTION 2024

COUNTRY	2024 HOP ACREAGE (acres)				2024 HOP PRODUCTION (pounds)			
	AROMA	ALPHA	NEW	TOTAL	AROMA	ALPHA	TOTAL	Alpha MT.
Argentina	324	116	0	440	579,810	213,846	793,656	31
Australia	1,604	269	0	1,873	2,960,778	363,759	3,324,537	247
Austria	514	143	4	667	573,196	154,322	727,518	22
Belgium	309	128	0	437	330,690	242,506	573,196	25
Brazil	62	62	3	131	169,754	227,074	396,828	16
Bulgaria	57	47	0	104	72,752	48,501	121,253	5
Canada	494	371	0	865	716,495	440,920	1,157,415	53
China	741	5,931	0	6,672	1,543,220	12,786,680	14,329,900	470
Czech Rep.	11,298	190	196	11,972	14,109,440	330,690	14,440,130	235
France	1,369	138	125	1,792	1,860,682	255,734	2,116,416	54
Germany	23,471	24,775	765	50,136	40,077,423	62,429,863	102,507,286	5,391
Great Britain	1,058	267	0	1,325	1,159,620	370,373	1,529,992	56
Italy	35	5	2	49	46,297	8,818	55,115	2
Japan	96	96	0	193	132,276	220,460	352,736	15
New Zealand	2,471	988	0	3,460	3,086,440	1,388,898	4,475,338	204
Poland	1,868	2,113	41	4,082	2,881,412	3,701,523	6,582,936	283
Romania	180	512	5	692	90,389	368,168	458,557	18
Russia	321	111	130	754	617,288	264,552	881,840	24
Serbia	30	0	0	30	52,910	0	52,910	2
Slovakia	94	0	0	94	97,002	0	97,002	3
Slovenia	3,840	44	72	4,062	4,850,120	99,207	4,949,327	125
South Africa	215	783	11	998	302,030	1,201,507	1,503,537	87
Spain	25	1,389	18	1,458	28,660	2,138,462	2,167,122	114
Ukraine	247	124	0	371	220,460	127,867	348,327	8
USA	36,439	8,354	0	44,793	52,543,332	34,528,868	87,072,200	4,863
IHGC Total	87,161	46,958	1,372	137,449	129,102,476	121,912,598	251,015,074	12,353

SOURCE: IHGC Economic Commission November report. US hop acreage is updated to reflect the USDA-NASS 2024 National Hop Report. IHGC Total Acreage includes baby acreage (not included in separate aroma and alpha tables). Numbers may not total exactly due to rounding and standard/metric conversions.

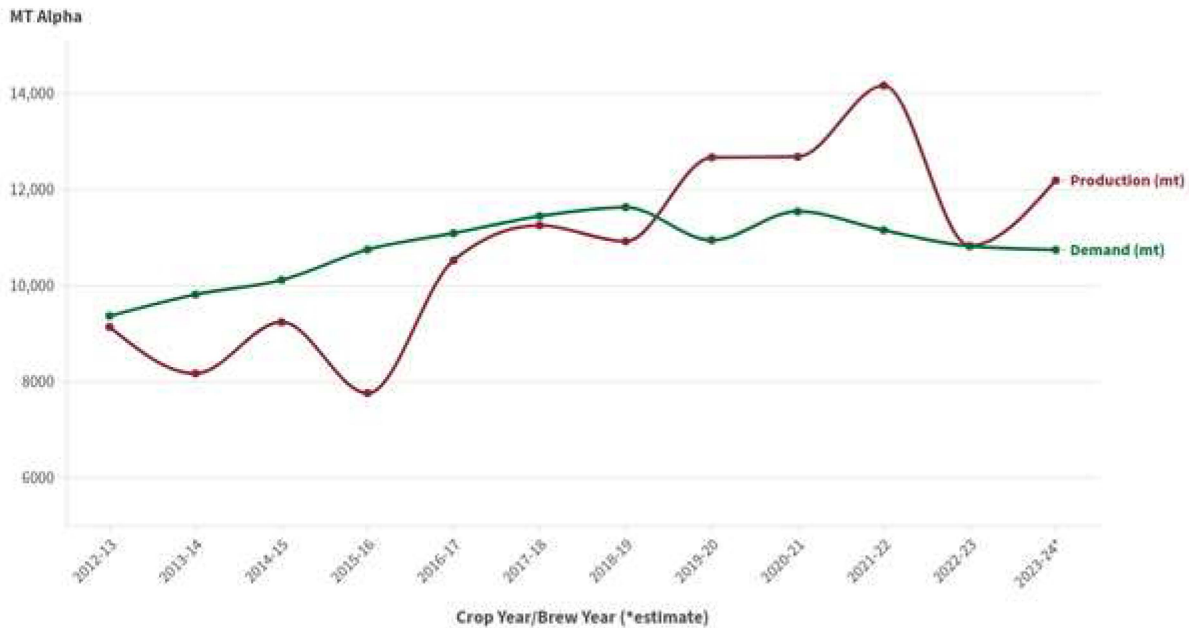
U.S. & GERMAN ALPHA ACID PRODUCTION (10 YEARS)

YEAR	UNITED STATES				GERMANY			
	Pounds of Hops (x1,000)	MT Hops EBC 7.4 MT=2204.6 lb	MT Alpha	Avg. Alpha %*	Pounds of Hops (x1,000)	MT Hops	MT Alpha EBC 7.4	Avg. Alpha %*
2015	80,351	36,447	3,856	10.6%	62,170	28,200	2,700	9.6%
2016	88,640	40,207	4,082	10.2%	94,304	42,776	4,501	10.5%
2017	107,497	48,760	5,300	11.0%	91,614	41,556	4,047	9.7%
2018	108,407	49,173	5,277	10.7%	92,139	41,794	3,828	9.2%
2019	113,041	51,275	5,755	11.2%	106,861	48,472	5,260	10.9%
2020	103,810	47,088	5,500	11.7%	103,347	46,878	5,438	11.6%
2021	115,631	52,450	5,874	11.2%	104,851	47,862	6,240	13.0%
2022	101,856	46,202	5,452	11.8%	75,397	34,406	3,725	10.8%
2023	104,043	47,194	5,758	12.2%	90,904	41,234	4,170	10.1%
2024*	87,072	39,496	4,937	12.5%	102,507	46,497	5,391	11.6%

*2024 figures are estimated at time of publication.

US figures include an estimate for non-PNW states, added to the Pacific Northwest production estimated by US hop merchant sources, based on EBC 7.4 method of analysis. Conversion factor of 90% is used to convert Spectro to EBC 7.4. German estimated alpha figure was also provided by hop merchant contacts.

WORLD ALPHA PRODUCTION & DEMAND



SOURCE: BarthHaas Report. 2023-2024. Prepared by HGA

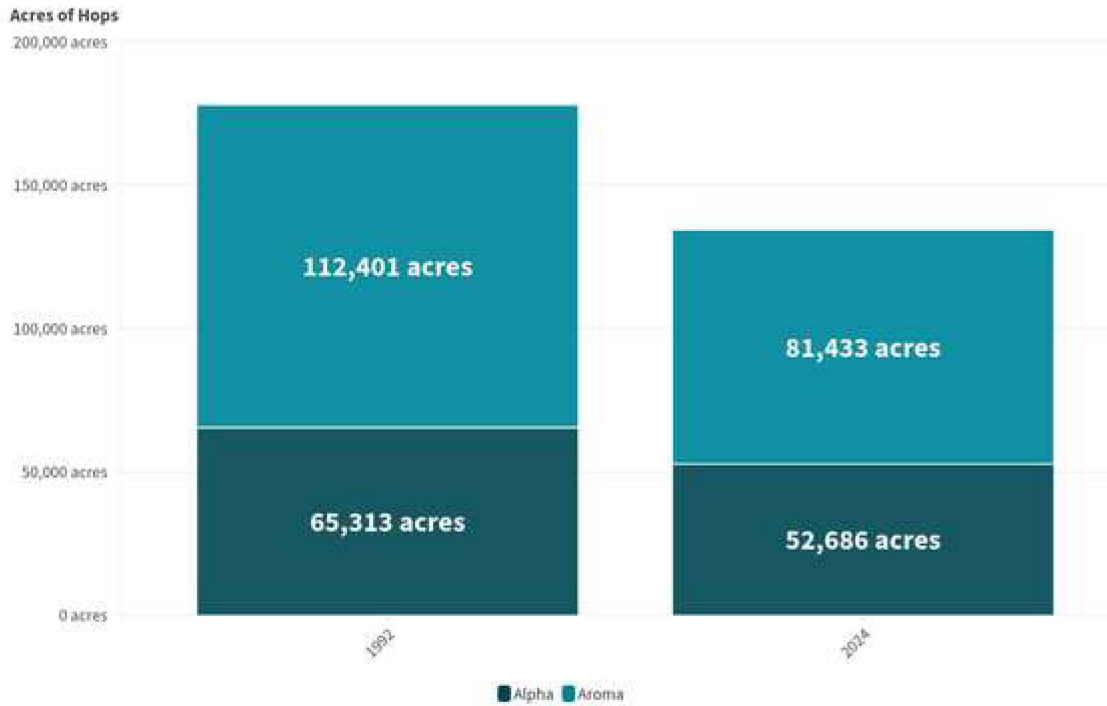
COMPARISON OF IHGC CROPS 2010-2024



*estimation

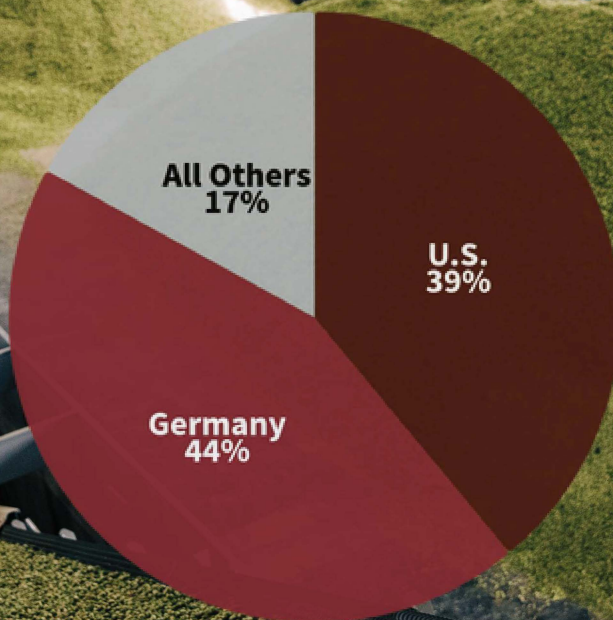
SOURCE: IHGC November Report. Prepared by HGA.

COMPOSITION OF WORLD HOP ACREAGE - 1992 VERSUS 2024



SOURCE: IHGC November Report and USDA-NASS 2024 National Hop Report. Prepared by HGA.

WORLD'S LARGEST ALPHA PRODUCERS – 2024



SOURCE: IHGC November Report. Prepared by HGA.

WORLD HOP ACREAGE & PERCENT SHARE (ACRES)

COUNTRY	2020	2021	2022	2023	2024
Germany	49,736 33%	49,298 33%	49,689 33%	49,355 34%	50,136 36%
USA	60,718 41%	62,259 41%	61,177 40%	55,710 38%	44,793 33%
Czech Rep.	11,604 8%	11,570 8%	11,572 8%	11,486 8%	11,972 9%
China	5,832 4%	5,832 4%	5,990 4%	5,990 4%	6,672 5%
Poland	4,268 3%	4,344 3%	4,112 3%	4,270 3%	4,082 3%
Europe (rest)	10,744 7%	10,663 7%	10,223 7%	10,186 7%	11,080 8%
World (rest)	6,805 5%	6,744 4%	8,417 6%	8,725 6%	8,713 6%
World Totals	149,708	150,710	151,179	145,722	137,449

Europe (rest): Austria, Belgium, Bulgaria, France, Great Britain, Italy, Romania, Serbia, Slovakia, Slovenia, Spain, Ukraine.

World (rest): Argentina, Australia, Brazil, Canada, Japan, New Zealand, Russia, South Africa.

SOURCE: IHGC Economic Commission November 2020-2024 reports. US hop acreage is updated to reflect the USDA-NASS 2024 National Hop Report.

WORLD HOP PRODUCTION & PERCENT SHARE (POUNDS X 1,000)

COUNTRY	2020	2021	2022	2023	2024
Germany	103,347 38%	105,517 37%	75,851 32%	90,904 35%	102,507 41%
USA	104,810 39%	116,531 41%	102,756 44%	104,943 40%	87,072 35%
Czech Rep.	13,062 5%	18,311 6%	9,815 4%	15,873 6%	14,440 6%
China	15,529 6%	13,889 5%	13,258 6%	14,330 5%	14,330 6%
Poland	8,018 3%	6,852 2%	7,549 3%	7,844 3%	6,583 3%
Europe (rest)	15,280 6%	14,264 5%	12,626 5%	14,004 5%	13,197 5%
World (rest)	11,175 4%	11,054 4%	13,195 6%	13,737 5%	12,886 5%
World Totals	271,222	286,417	235,050	261,635	251,015

Europe (rest): Austria, Belgium, Bulgaria, France, Great Britain, Italy, Romania, Serbia, Slovakia, Slovenia, Spain, Ukraine.

World (rest): Argentina, Australia, Brazil, Canada, Japan, New Zealand, Russia, South Africa.

SOURCE: IHGC Economic Commission November 2020-2024 reports. US hop acreage is updated to reflect the USDA-NASS 2024 National Hop Report.

EXPORTS OF U.S. HOPS(INCLUDING EXTRACT), TOP 40 COUNTRIES (2020-2024)

Rank	Destination Partner	September-August Quantities (MT)				
		2020	2021	2022	2023	2024
1	Belgium-Luxembourg(*)	2,318.9	3,151.4	3,864.5	2,671.1	2,907.5
2	Germany	2,226.5	2,127.6	2,327.7	2,179.0	1,886.5
3	Canada	2,500.0	2,073.8	2,054.8	2,033.5	1,877.9
4	United Kingdom	1,973.9	2,090.8	2,306.4	1,420.4	1,819.1
5	Brazil	1,768.0	2,280.1	2,258.8	1,992.7	1,724.1
6	China	967.0	938.5	1,374.2	1,190.8	1,125.3
7	Australia(*)	751.2	1,017.1	1,230.4	954.9	734.5
8	Mexico	588.1	725.6	885.9	915.6	632.9
9	Argentina	817.3	796.8	886.0	400.4	595.2
10	Japan	515.9	486.5	479.7	487.0	542.5
11	Colombia	196.5	220.5	182.7	248.9	257.9
12	Netherlands	100.1	103.8	321.6	160.9	248.4
13	Vietnam	355.5	268.5	198.2	279.0	234.8
14	Korea, South	219.0	277.6	288.1	297.4	224.3
15	Chile	222.2	297.2	166.0	137.0	149.4
16	India	25.6	44.3	125.8	140.1	146.6
17	New Zealand(*)	146.9	242.2	327.4	287.1	141.4
18	Hong Kong	184.3	286.1	267.0	133.7	129.3
19	Dominican Republic	93.8	117.1	83.9	41.7	110.9
20	Guatemala	50.6	47.4	80.2	28.6	85.2
21	Venezuela	2.2	34.8	68.0	22.3	80.7
22	Peru	122.6	154.5	100.4	28.7	78.6
23	South Africa	36.5	75.1	43.8	100.0	65.6
24	Ireland	69.9	74.0	123.5	45.7	63.8
25	Philippines	141.2	66.4	68.3	91.2	60.9
26	Honduras	18.7	25.5	4.9	22.7	39.6
27	Thailand	1.7	18.2	260.7	57.9	28.8
28	El Salvador	24.6	38.3	31.4	14.1	24.9
29	Ecuador	46.4	63.1	44.5	31.2	23.6
30	Turkey	23.4	6.5	24.8	19.2	23.4
31	Burma	5.9	6.9	12.7	27.3	23.3
32	Cambodia	26.5	28.5	27.5	43.3	22.6
33	Russia	97.7	145.9	144.9	39.6	21.1
34	Panama	40.4	61.8	38.2	29.1	20.9
35	Italy(*)	5.0	14.1	15.9	31.1	19.3
36	Singapore	14.7	7.2	12.1	6.3	18.7
37	Bolivia	15.4	14.4	46.0	59.7	16.7
38	Malaysia	16.8	11.1	16.6	16.7	16.3
39	Czech Republic	12.0	21.6	18.7	19.3	16.1
40	Uruguay	49.0	23.1	58.6	37.7	12.7
	Total Top 40 Countries	16,791.9	18,483.9	20,870.8	16,742.9	16,251.3
	All Other Countries	273.1	294.7	319.4	305.3	156.5
	Grand Total	17,065.0	18,778.6	21,190.2	17,048.2	16,407.8

USDA Global Agricultural Trade System. Data Source: U.S. Census Bureau Trade Data. (*) denotes a country that is a summarization of its component countries. Quantity includes the total for all forms of hops (dried cones, powder, pellets, extract, and downstream products) with no conversion factor applied to represent dried hop cone weight equivalent.



U.S. IMPORTS OF HOPS (FIVE YEARS)

Rank	Destination Partner	September-August Quantities (MT)				
		2020	2021	2022	2023	2024
1	Germany	2,909.8	3,073.2	2,243.6	2,050.0	1,423.8
2	Australia(*)	750.9	399.8	1,009.9	817.4	755.7
3	New Zealand(*)	954.4	852.6	1,148.5	1,332.9	745.8
4	United Kingdom	209.5	134.7	157.4	118.0	162.5
5	Czech Republic	86.1	163.9	142.9	82.5	129.9
6	Canada	32.2	25.0	23.6	42.3	30.2
7	China	49.8	11.5	5.7	3.9	6.1
8	Belgium-Luxembourg(*)	0.2	10.5	8.1	30.3	5.7
9	Ethiopia(*)	1.8	6.7	9.5	0.0	5.1
10	Slovenia	45.8	22.5	12.0	14.2	4.2
11	Jamaica	0.0	0.0	0.0	0.0	3.2
12	Austria	1.4	5.7	10.2	2.3	2.8
13	France(*)	2.8	4.1	3.6	27.7	1.9
14	Poland	0.0	2.1	1.7	0.4	0.8
15	Argentina	0.0	0.0	0.3	0.0	0.0
16	Brazil	0.0	0.0	-	-	0.0
17	Chile	1.3	0.0	0.0	0.0	0.0
18	Hong Kong	0.0	0.0	0.0	0.4	0.0
19	India	0.0	0.0	0.0	1.0	0.0
20	Italy(*)	13.9	6.2	0.9	0.6	0.0
21	Japan	0.0	0.0	0.0	0.0	0.0
22	Slovakia	0.0	0.0	0.0	0.1	0.0
23	Netherlands	0.0	0.0	27.9	10.5	0.0
24	South Africa	118.8	0.0	265.6	11.4	0.0
25	Sierra Leone	37.2	0.0	0.0	0.0	0.0
26	Spain	0.0	0.0	0.2	2.2	0.0
Grand Total		5,215.8	4,718.6	5,071.8	4,548.2	3,277.7

USDA Global Agricultural Trade System. Data Source: U.S. Census Bureau Trade Data. Quantity includes the total for all forms of hops (dried cones, powder, pellets, extract, and downstream products) with no conversion factor applied to represent dried hop cone weight.

WORLD BEER PRODUCTION BY BREWERY (TOP 10) 2022-23 (MILLION HL)

Brewery	2022 Production	2022 % Share	2023 Production	2023 % Share
ABInBev	518.00	27.4%	505.90	26.9%
Heineken	256.90	13.6%	242.60	12.9%
China Res. Snow Breweries	122.20	6.5%	111.51	5.9%
Carlsberg	102.40	5.4%	101.00	5.4%
Molson-Coors	82.30	4.4%	83.77	4.4%
Tsingtao Brewery Group	79.60	4.2%	74.10	3.9%
Asahi Group	59.30	3.1%	65.00	3.5%
BGI/Groupe Castel	43.70	2.3%	42.70	2.3%
Yanjing	37.70	2.0%	39.42	2.1%
Efes Group	34.00	1.8%	35.70	1.9%
Top 10 total	1,336.1	70.7%	1,301.7	69.2%

The top 3 brewing groups controlled 45.7% of the market share in 2023, down from 47.5% in 2022.
The top 40 brewing groups worldwide represented 86.2% market share in 2023.
Source: Barth Report 2023-24

FOR AN INTERESTING COMPARISON, HERE IS THE RANKING FOR WORLD BEER PRODUCTION BY BREWERY (TOP 10) FOR 1988 (MILLION HL)

Brewery	1988 Production	1988 % Share
Anheuser-Busch	90	7%
Miller	47	4%
Heineken	43	3%
Kirin	30	2%
Bond	30	2%
Stroh	25	2%
Elders	21	2%
Kronenbourg	20	2%
Coors	20	2%
Brahma	18	1%
Top 10 total	344	26%

WORLD BEER PRODUCTION 2020-2023 (MILLION HL)

Country	2020	2021	2022	2023*
Germany	87.0	85.4	87.8	88.5
Russia	79.5	81.6	70.4	70.4
Spain	34.7	38.1	41.1	42.0
England	45.0	40.6	39.7	39.7
Poland	38.4	38.2	37.9	38.0
Netherlands	22.1	22.1	26.0	26.0
Belgium	23.5	25.1	23.3	23.0
Czech Republic	18.5	19.3	20.6	20.6
France	20.7	22.1	20.0	20.0
Italy	16.2	16.6	18.0	18.0
Romania	16.8	16.6	16.1	16.0
Austria	9.6	9.9	10.4	10.1
Turkey	8.7	9.3	9.5	9.5
Ireland	6.7	7.5	8.0	8.0
Other Europe	83.4	86.1	75.5	75.2
Total Europe	510.8	518.5	504.3	505.0
USA	210.0	219.5	213.0	211.0
Brazil	135.0	139.0	143.0	142.0
Mexico	112.0	120.0	126.0	128.0
Colombia	22.0	22.0	23.5	23.6
Canada	21.8	21.8	22.6	22.5
Argentina	19.0	20.0	19.8	19.7
Peru	14.0	14.8	14.8	14.8
Chile	8.6	8.7	8.6	8.5
Other Americas	39.2	40.8	40.8	40.6
Total Americas	581.6	606.6	612.1	610.7
P.R. China	329.9	365.3	356.9	355.0
Japan	44.1	45.1	43.0	44.0
Vietnam	38.0	42.3	40.1	31.6
India	19.0	16.2	23.0	23.8
Thailand	17.0	18.9	21.0	21.8
South Korea	16.4	13.2	17.8	18.1
Philippines	18.5	18.3	17.6	16.6
Cambodia	11.6	13.8	13.5	14.0
Other Asia	34.9	37.3	33.5	32.4
Total Asia	529.4	570.4	566.4	557.3
South Africa	26.0	31.0	32.5	32.3
Nigeria	16.5	19.4	19.6	19.5
Angola	9.0	11.0	11.0	11.0
Ethiopia	10.6	9.0	10.0	10.0
Other Africa	62.4	68.5	81.8	82.5
Total Africa	124.5	138.9	154.9	155.3
Australia	16.6	16.8	17.0	17.0
Other Australia	4.2	4.3	3.4	3.1
Total Australia	20.8	21.1	20.4	20.1
WORLD TOTALS	1,767.1	1,855.5	1,858.1	1,848.4

Source: S.S. Steiner 2023 Guidelines for Hop Buying

- Estimate