



2011

STATISTICAL REPORT

RELEASED JANUARY 2012

PRESENTED BY
HOP GROWERS OF AMERICA



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Conversions used while compiling
the data presented in this document:

1 hectare = 2.4711 acres
1 acre = 0.405 hectares
1 kilogram = 2.2046 pounds
1 pound = 0.45 kilograms
1 metric tonne = 2204.6 pounds
1 hectoliter = 21.997 gallons
1 zentner = 110.23 pounds

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

STATE & VARIETY	ACRES HARVESTED					2010-11
	2007	2008	2009	2010	2011	% +/-
IDAHO						
Total Idaho	2,896	3,933	4,030	2,331	2,265	-2.83%
OREGON						
Cascade	*	76	152	122	263	115.57%
Golding	115	135	*	*	*	
Liberty	*	*	*	*	108	
Magnum	*	*	*	*	64	
Millennium	294	343	344	*	*	
Mt. Hood	178	186	158	188	214	13.83%
Nugget	1,675	2,135	1,773	1,356	1,438	6.05%
Perle	*	*	*	*	98	
Sterling	95	95	101	87	86	-1.15%
Super Galena®	*	*	177	134	241	79.85%
Tettnanger	*	*	*	*	70	
Willamette	2,396	2,593	2,469	1,452	779	-46.35%
Other	517	807	934	1,283	841	-34.45%
Total Oregon	5,270	6,370	6,108	4,622	4,202	-9.09%
WASHINGTON						
Ahtanum	42	*	*	*	*	
Apollo®	*	698	747	827	885	7.01%
Bravo®	*	222	335	414	593	43.24%
Cascade	1,303	2,073	2,019	1,728	2,108	21.99%
Centennial	*	253	298	357	641	79.55%
Chelan	505	739	762	*	*	
Chinook	311	285	384	443	572	29.12%
Citra™	*	*	98	113	239	111.50%
Cluster	366	420	501	392	482	22.96%
Columbus/Tomahawk®	3,342	4,891	4,858	3,401	2,947	-13.35%
Galena	3,030	2,584	2,412	1,920	1,415	-26.30%
Glacier	21	56	70	61	44	-27.87%
Golding	52	38	42	*	*	
Hallertauer	56	*	*	*	*	
Millennium	728	716	557	555	403	-27.39%
Mt. Hood	43	29	96	62	95	53.23%
Northern Brewer	*	*	92	94	159	
Nugget	1,093	1,086	1,028	829	861	3.86%
Simcoe	*	129	183	237	495	108.86%
Summit® ²	632	2,403	3,238	*	2,477	
Super Galena®	*	793	839	886	990	11.74%
Vanguard	64	*	*	*	*	
Willamette	4,462	4,664	2,719	1,734	894	-48.44%
YCR-4 - Palisade®	91	307	351	373	308	-17.43%
YCR-5 - Warrior®	339	394	301	296	260	-12.16%
Zeus	4,737	6,779	6,544	4,440	4,159	-6.33%
Other* ²	1,528	1,036	1,212	5,174	2,293	-55.68%
Total Washington	22,745	30,595	29,686	24,336	23,320	-4.17%
Total United States ³	30,911	40,898	39,824	31,289	29,787	-4.80%

SOURCE: USDA-NASS and ADHA. Prepared by HGA.

* Included in the category "Other" to avoid disclosure of individual operations.

² An estimate for Summit acreage provided by the American Dwarf Hop Association is reported as a separate variety in this chart, deducting that acreage from the "Other" acreage reported by NASS for 2007, 2008, 2009, and 2011.

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

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2010-11
	2007	2008	2009	2010	2011	% +/-
IDAHO						
Total Idaho	1,417	1,841	1,943	2,129	2,408	13.10%
OREGON						
Cascade	*	1,068	1,741	1,680	1,616	-3.81%
Golding	1,403	1,307	*	*	*	
Liberty	*	*	*	*	1,326	
Magnum	*	*	*	*	1,928	
Millennium	2,323	2,179	2,552	*	*	
Mt. Hood	1,640	1,552	1,671	1,640	1,890	15.24%
Nugget	2,231	1,758	2,548	2,119	2,317	9.34%
Perle	*	*	*	*	1,622	
Sterling	1,665	1,667	1,684	1,644	1,915	16.48%
Super Galena®	*	*	2,563	2,421	2,263	-6.53%
Tettnanger	*	*	*	*	1,634	
Willamette	1,577	1,539	1,561	1,535	1,716	11.79%
Other	1,416	995	1,601	1,711	1,511	-11.69%
Total Oregon	1,811	1,569	1,948	1,791	1,908	6.53%
WASHINGTON						
Ahtanum	1,964	*	*	*	*	
Apollo®	*	2,229	2,941	2,778	2,758	-0.72%
Bravo®	*	2,340	2,397	2,566	2,609	1.68%
Cascade	2,031	1,781	2,120	1,905	1,955	2.62%
Centennial	*	1,452	1,490	1,791	1,403	-21.66%
Chelan	2,364	2,178	2,680	*	*	
Chinook	1,818	1,775	1,819	1,963	1,718	-12.48%
Citra™	*	*	836	1,930	1,812	-6.11%
Cluster	2,030	2,038	2,370	2,060	2,019	-1.99%
Columbus/Tomahawk®	2,533	2,585	2,790	2,350	2,519	7.19%
Galena	1,776	1,826	1,852	1,810	1,821	0.61%
Glacier	1,619	1,795	2,093	1,943	2,182	12.30%
Golding	1,500	1,385	826	*	*	
Hallertauer	763	*	*	*	*	
Millennium	2,350	2,440	2,465	2,185	2,562	17.25%
Mt. Hood	1,316	1,572	1,570	1,211	838	-30.80%
Northern Brewer	*	*	753	1,270	1,698	33.70%
Nugget	1,909	2,068	2,060	1,808	1,969	8.90%
Simcoe	*	1,758	2,137	1,698	1,779	4.77%
Summit® #	1,822	1,724	2,687	*	2,705	
Super Galena®	*	2,104	3,186	2,622	3,041	15.98%
Vanguard	1,470	*	*	*	*	
Willamette	1,318	1,351	1,455	1,350	1,510	11.85%
YCR4 - Palisade®	2,519	2,091	2,756	2,431	2,562	5.39%
YCR5 - Warrior®	1,903	1,846	2,110	1,778	2,061	15.92%
Zeus	2,839	2,618	3,387	2,678	2,572	-3.96%
Other #	1,355	1,233	1,567	1,968	1,210	-38.52%
Total Washington	2,049	2,072	2,533	2,147	2,200	2.47%
Total United States	1,949	1,971	2,383	2,093	2,175	3.92%

SOURCE: USDA-NASS and ADHA. Prepared by HGA.

* included in the category "Other" to avoid disclosure of individual operations.

A yield estimate for Summit provided by the American Dwarf Hop Association is provided as a separately reported variety in this chart, deducting that amount from the "Other" yields reported by NASS for 2007, 2008, 2009, and 2011.

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

STATE & VARIETY	HOP PRODUCTION (POUNDS)					2010-11 % +/-
	2007	2008	2009	2010	2011	
IDAHO						
Total Idaho	4,104,900	7,239,800	7,829,100	4,962,600	5,454,100	9.90%
OREGON						
Cascade	*	81,200	264,600	205,000	425,000	107.32%
Golding	161,400	176,400	*	*	*	
Liberty	*	*	*	*	143,200	
Magnum	*	*	*	*	123,400	
Millennium	682,900	747,400	877,900	*	*	
Mt. Hood	292,000	288,600	264,000	308,300	404,500	31.20%
Nugget	3,737,500	3,753,200	4,517,100	2,873,200	3,332,100	15.97%
Perle					159,000	
Sterling	158,200	158,400	170,100	143,000	164,700	15.17%
Super Galena®	*	*	453,700	324,400	545,500	68.16%
Tettnanger	*	*	*	*	114,400	
Willamette	3,778,800	3,989,600	3,853,900	2,228,300	1,337,000	-40.00%
Other	732,000	802,800	1,495,400	2,195,400	1,270,600	-42.12%
Total Oregon	9,542,800	9,997,600	11,896,700	8,277,600	8,019,400	-3.12%
WASHINGTON						
Ahtanum	82,500	*	*	*	*	
Apollo®	*	1,555,800	2,196,900	2,297,400	2,440,400	6.22%
Bravo®	*	519,500	803,000	1,062,300	1,547,200	45.65%
Cascade	2,646,400	3,692,000	4,280,300	3,291,800	4,121,300	25.20%
Centennial	*	367,400	444,000	639,400	899,400	40.66%
Chelan	1,193,800	1,609,500	2,042,200	*	*	
Chinook	565,400	505,900	698,500	869,600	982,800	13.02%
Citra™	*	*	81,900	218,100	433,100	98.58%
Cluster	743,000	856,000	1,187,400	807,500	973,300	20.53%
Columbus/Tomahawk®	8,465,300	12,643,200	13,553,800	7,992,400	7,422,400	-7.13%
Galena	5,381,300	4,718,400	4,467,000	3,475,200	2,576,200	-25.87%
Glacier	34,000	100,500	146,500	118,500	96,000	-18.99%
Golding	78,000	52,600	34,700	*	*	
Hallertauer	42,700	*	*	*	*	
Millennium	1,710,800	1,747,000	1,373,000	1,212,700	1,032,400	-14.87%
Mt. Hood	56,600	45,600	150,700	75,100	79,600	5.99%
Northern Brewer	*	*	69,300	119,400	270,000	
Nugget	2,086,500	2,245,800	2,117,700	1,498,800	1,695,100	13.10%
Simcoe®	*	226,800	391,100	402,400	880,800	118.89%
Summit® #	1,151,500	4,143,000	8,700,568	*	6,702,506	
Super Galena®	*	1,668,500	2,673,100	2,323,100	3,010,600	29.59%
Vanguard	94,100	*	*	*	*	
Willamette	5,880,900	6,301,100	3,956,100	2,340,900	1,350,000	-42.33%
YCR4 - Palisade®	229,200	641,900	967,400	906,800	789,100	-12.98%
YCR5 - Warrior®	645,100	727,300	635,100	526,300	535,900	1.82%
Zeus	13,448,300	17,747,400	22,164,500	11,890,300	10,695,900	-10.05%
Other #	2,070,000	1,277,500	1,899,232	10,184,400	2,774,094	-72.76%
Total Washington	46,605,400	63,392,700	75,034,000	52,252,400	51,308,100	-1.81%
Total United States	60,253,100	80,630,100	94,759,800	65,492,600	64,781,600	-1.09%

SOURCE: USDA-NASS and ADHA. Prepared by HGA.

* included in the category "Other" to avoid disclosure of individual operations.

A production estimate for Summit provided by the American Dwarf Hop Association is provided as a separately reported variety in this chart, deducting that amount from the "Other" production reported by NASS for 2007, 2008, 2009, and 2011.

U.S. HOP ACREAGE BY STATE (10 YEARS - IN ACRES)

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
2002	20,333	5,577	3,399	29,309
2003	19,492	5,748	3,429	28,669
2004	19,382	5,107	3,253	27,742
2005	21,013	5,163	3,287	29,463
2006	21,532	5,036	2,797	29,365
2007	22,745	5,270	2,896	30,911
2008	30,595	6,370	3,933	40,898
2009	29,588	6,108	4,030	39,726
2010	24,336	4,622	2,331	31,289
2011	23,320	4,202	2,265	29,787

SOURCE: USDA-NASS. Prepared by HGA.

U.S. AVERAGE HOP YIELD (TEN YEARS)

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL U.S.
2002	2,133	1,692	1,624	1,990
2003	2,050	1,626	1,536	1,903
2004	2,137	1,686	1,588	1,990
2005	1,878	1,560	1,640	1,796
2006	2,058	1,757	1,613	1,964
2007	2,049	1,811	1,417	1,949
2008	2,072	1,569	1,841	1,971
2009	2,533	1,948	1,943	2,383
2010	2,147	1,791	2,129	2,093
2011	2,200	1,908	2,408	2,175

SOURCE: USDA-NASS. Prepared by HGA.

U.S. HOPS: 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)
2002	\$1.92	\$2.07	\$1.58	\$1.91	58,336	\$111,546
2003	\$1.79	\$2.32	\$1.62	\$1.86	54,565	\$101,637
2004	\$1.83	\$2.31	\$1.60	\$1.88	55,203	\$103,969
2005	\$1.86	\$2.56	\$1.63	\$1.94	52,914	\$102,818
2006	\$1.98	\$2.60	\$1.61	\$2.05	57,672	\$118,008
2007	\$2.94	\$3.31	\$2.77	\$2.99	60,253	\$179,978
2008	\$4.08	\$3.75	\$4.00	\$4.03	80,630	\$325,092
2009	\$3.54	\$3.63	\$3.75	\$3.57	94,678	\$337,874
2010	\$3.11	\$3.96	\$3.89	\$3.28	65,493	\$214,589
2011	\$2.75	\$2.93	\$2.72	\$2.77	64,782	\$179,429

SOURCE: USDA-NASS. Prepared by HGA.

2011 HOP INSPECTION REPORT

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

YEAR	WASHINGTON (%)	OREGON (%)	IDAHO (%)	TOTAL (%)
2007	232,630 (0.18)	48,196 (0.20)	20,523 (0.19)	301,349 (0.19)
2008	302,122 (0.34)	45,321 (0.22)	21,397 (0.03)	368,840 (0.31)
2009	356,581 (0.12)	53,178 (0.25)	27,328 (0.15)	437,087 (0.14)
2010	259,380 (0.17)	41,384 (0.15)	24,000 (0.04)	326,764 (0.16)
2011	254,385 (0.14)	40,093 (0.09)	27,251 (0.02)	321,729 (0.12)

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

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	224,139	26,004	3,322	672	218	30	-	-	254,385
OR	36,554	3,476	63	-	-	-	-	-	40,093
ID	26,626	625	-	-	-	-	-	-	27,251
Total	287,319	30,105	3,385	672	218	-	-	-	321,699
% of Total	92%	7%	0%	0%	0%	0%	0%	0%	100%

TABLE 3. Number of Bales in Each Seed Category

	0%	1%	2%	3%	4%	5%	6%	7+%	TOTAL
WA	113,950	63,573	36,783	16,429	13,093	4,927	2,777	2,853	254,385
OR	10,363	5,940	5,456	3,956	4,157	2,700	1,596	5,925	40,093
ID	19,412	1,620	2,433	1,618	1,390	-	376	402	27,251
Total	143,725	71,133	44,672	22,003	18,640	7,627	4,749	9,180	321,729
% of Total	47%	15%	12%	7%	7%	3%	2%	6%	100%

SOURCE: USDA-GIPSA (Federal Grain Inspection Service).

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

Year	WASHINGTON	OREGON	IDAHO	U.S. AVERAGE %	
	Leaf & Stem	Leaf & Stem	Leaf & Stem	Leaf & Stem	Seed Content
2002	0.07	0.32	0.04	0.11	0.63
2003	0.06	0.12	0.05	0.11	0.50
2004	0.11	0.28	0.01	0.07	0.56
2005	0.08	0.18	0.01	0.10	0.80
2006	0.09	0.16	0.14	0.15	0.56
2007	0.18	0.20	0.23	0.19	0.83
2008	0.34	0.22	0.03	0.31	1.85
2009	0.12	0.25	0.15	0.14	0.82
2010	0.17	0.15	0.04	0.16	1.31
2011	0.14	0.09	0.02	0.12	1.34

SOURCE: USDA-GIPSA (Federal Grain Inspection Service). Prepared by HGA.

IHGC AROMA ACREAGE (FIVE YEARS)

COUNTRY	AROMA ACREAGE (IN ACRES)					2010-11
	2007	2008	2009	2010	2011	% +/-
Australia*	22	82	67	79	119	50.00%
Austria	462	479	474	460	477	3.76%
Belgium	106	126	126	126	148	17.65%
China*	1,359	1,433	1,433	1,433	1,433	0.00%
Czech Rep.	12,664	12,486	12,316	12,215	10,791	-11.65%
France	1,814	1,814	1,068	983	892	-9.30%
Germany	24,998	25,386	23,673	23,844	23,569	-1.15%
New Zealand	556	531	568	568	655	15.22%
Poland*	1,942	1,905	1,905	1,008	939	-6.86%
Romania			183	158	151	-4.69%
Russia*	395	376	376	855	208	-75.72%
Serbia*	84	84	84	84	84	0.00%
Slovakia	741	531	581	566	549	-3.06%
Slovenia	3,415	3,615	3,581	3,210	3,168	-1.31%
South Africa*	0	0	0	0	0	0.00%
Spain	0	0	0	0	0	0.00%
Ukraine	1,527	1,606	1,589	1,663	1,184	-28.83%
UK - England	1,977	1,977	2,002	2,019	1,977	-2.08%
USA	10,977	15,182	13,425	10,811	10,361	-4.16%
IHGC Total	63,040	67,614	63,450	60,082	56,704	-5.62%

*Countries with partial provided report updates for the IHGC. Missing figures were used from previous reports or from IHGC estimates.

SOURCE: IHGC Economic Commission annual reports.

Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC ALPHA ACREAGE (FIVE YEARS)

COUNTRY	ALPHA ACREAGE (IN ACRES)					2010-11
	2007	2008	2009	2010	2011	% +/-
Australia*	1,068	1,114	1,203	1,028	1,006	-2.16%
Austria	32	32	54	79	89	12.50%
Belgium	329	334	334	334	297	-11.11%
China*	12,553	12,889	12,889	12,889	12,889	0.00%
Czech Rep.	168	178	163	183	161	-12.16%
France	91	94	99	111	156	40.00%
Germany	16,378	17,883	20,228	20,906	20,248	-3.14%
New Zealand	309	371	420	371	284	-23.33%
Poland*	3,442	3,613	3,613	3,361	2,718	-19.12%
Romania			428	425	428	0.58%
Russia*	168	168	168	183	133	-27.03%
Serbia*	82	62	82	82	82	0.00%
Slovakia	0	0	0	0	0	0.00%
Slovenia	183	171	168	138	178	28.57%

South Africa*	1,082	1,097	1,189	1,216	1,216	0.00%
Spain	1,216	1,149	1,156	1,211	1,260	4.08%
Ukraine	1,021	724	808	588	381	-35.29%
UK - England	642	642	667	623	593	-4.76%
USA	19,934	25,717	26,300	20,436	19,655	-3.82%
IHGC Total	58,699	66,238	69,969	64,162	61,773	-3.72%

*Countries with partial provided report updates for the IHGC. Missing figures were used from previous reports or from IHGC estimates.

SOURCE: IHGC Economic Commission annual reports.

Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC TOTAL ACREAGE (FIVE YEARS)

COUNTRY	TOTAL ACREAGE (IN ACRES)					2010-11
	2007	2008	2009	2010	2011	% +/-
Australia*	1,090	1,090	1,270	1,107	1,124	1.56%
Austria	494	519	529	536	566	5.53%
Belgium	435	460	460	460	445	-3.23%
China*	13,912	14,322	14,322	14,322	14,322	0.00%
Czech Rep.	12,832	12,664	12,479	12,398	10,952	-11.66%
France	1,905	1,910	1,164	1,095	1,048	-4.29%
Germany	41,376	43,269	43,902	44,749	43,818	-2.08%
New Zealand	865	902	988	939	939	0.00%
Poland*	5,385	5,291	5,518	4,369	3,657	-16.29%
Romania			610	583	578	-0.85%
Russia*	563	544	544	1,038	341	-67.14%
Serbia*	166	188	166	166	166	0.00%
Slovakia	741	531	581	566	549	-3.06%
Slovenia	3,598	4,003	3,749	3,348	3,346	-0.07%
South Africa*	1,082	1,097	1,189	1,216	1,216	0.00%
Spain	1,216	1,216	1,156	1,211	1,260	4.08%
Ukraine	2,548	2,481	2,397	2,251	1,564	-30.52%
UK - England	2,619	2,718	2,669	2,642	2,570	-2.71%
USA	30,911	39,263	39,725	31,247	30,016	-3.94%
IHGC Total	121,739	132,468	133,417	124,242	118,477	-4.64%

*Countries with partial provided report updates for the IHGC. Missing figures were used from previous reports or from IHGC estimates.

SOURCE: IHGC Economic Commission annual reports. 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.

IHGC HOP ACREAGE AND PRODUCTION 2011

COUNTRY	HOP ACREAGE (acres)			HOP PRODUCTION (pounds)			
	AROMA	ALPHA	TOTAL	AROMA	ALPHA	TOTAL	Alpha MT.
Australia*	119	1,006	1,124	171,959	2,129,644	2,301,602	130
Austria	477	89	566	846,566	147,708	994,275	36
Belgium	148	297	445	158,731	476,194	634,925	25
China*	1,433	12,889	14,322	3,527,360	26,455,200	29,982,560	800
Czech Rep.	10,791	161	10,952	13,503,175	275,575	13,778,750	307
France	892	156	1,048	1,219,144	200,619	1,419,762	42
Germany	23,569	20,248	43,818	40,785,100	41,887,400	82,672,500	4,400
New Zealand	655	284	939	859,794	407,851	1,267,645	65
Poland*	939	2,718	3,657	1,102,300	3,306,900	4,409,200	150
Romania	151	428	578	103,616	275,575	379,191	15
Russia*	208	133	341	202,823	154,322	357,145	9
Serbia*	84	82	166	127,867	167,550	295,416	11
Slovakia	549	0	549	599,651	0	599,651	13
Slovenia	3,168	178	3,346	4,629,660	220,460	4,850,120	140
South Africa*	0	1,216	1,216	0	2,012,800	2,012,800	128
Spain	0	1,260	1,260	0	2,081,142	2,081,142	116
Ukraine	1,184	381	1,564	1,139,778	273,370	1,413,149	45
UK - England	1,977	593	2,570	2,425,060	925,932	3,350,992	95
USA	10,361	19,655	30,016	12,125,300	52,866,308	64,991,608	4,308
IHGC Total	56,704	61,773	118,477	83,527,885	134,264,549	217,792,434	10,835

SOURCE: November 2011 IHGC Economic Commission Report. Numbers may not total exactly due to rounding and standard/metric conversions.

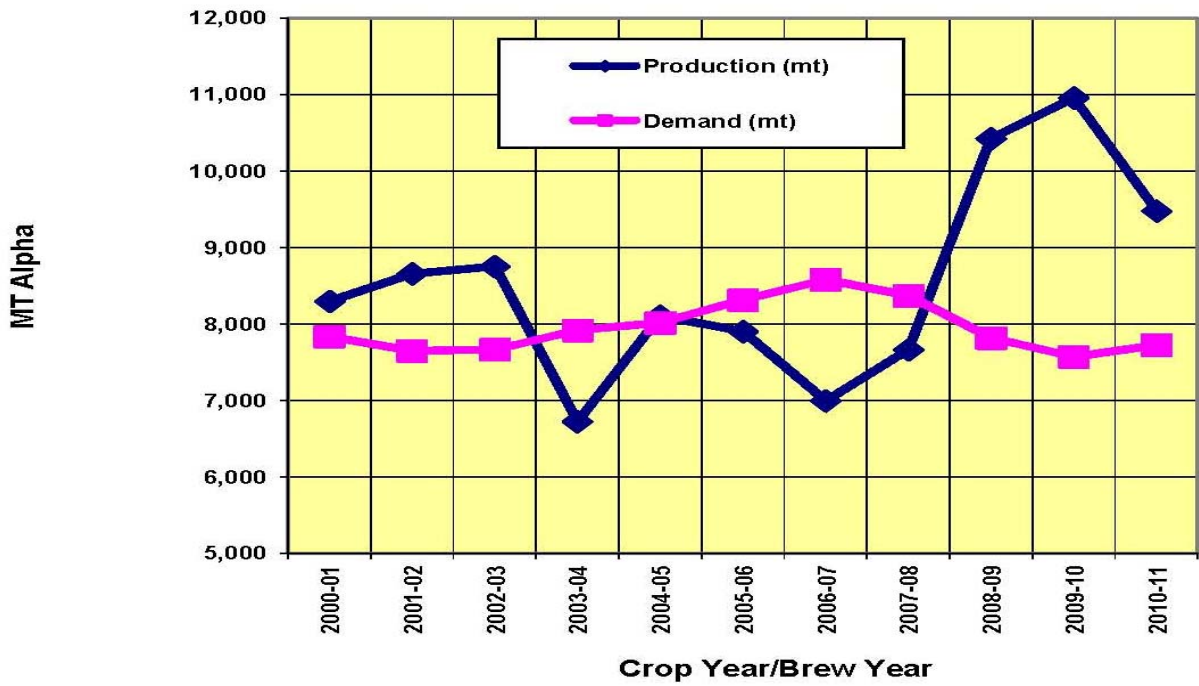
U.S. & GERMAN ALPHA ACID PRODUCTION (10 YEARS)

YEAR	UNITED STATES				GERMANY			
	Pounds of Hops (x 1,000)	MT Hops	MT Alpha	Avg. Alpha %*	Pounds of Hops (x 1,000)	MT Hops	MT Alpha	Avg. Alpha %*
2002	56,912	25,815	3,140	12.2%	69,445	31,500	2,951	9.4%
2003	54,039	24,512	2,900	11.8%	55,115	25,000	1,825	7.3%
2004	55,538	25,192	2,900	11.5%	73,854	33,500	2,915	8.7%
2005	51,796	23,495	2,600	11.1%	75,397	34,200	3,272	9.6%
2006	53,815	24,410	2,929	12.0%	62,832	28,500	2,328	8.2%
2007	58,988	26,757	3,280	12.3%	70,854	32,139	2,880	9.0%
2008	80,630	36,574	4,150	11.3%	70,854	32,139	4,100	12.8%
2009	91,491	41,500	4,690	11.3%	87,104	39,510	3,520	8.9%
2010	64,954	29,463	3,517	11.9%	75,177	34,100	3,600	10.6%
2011	64,992	29,480	4,308	14.6%	82,673	37,500	4,400	11.7%

SOURCE: IHGC November Economic Commission reports. Prepared by HGA.

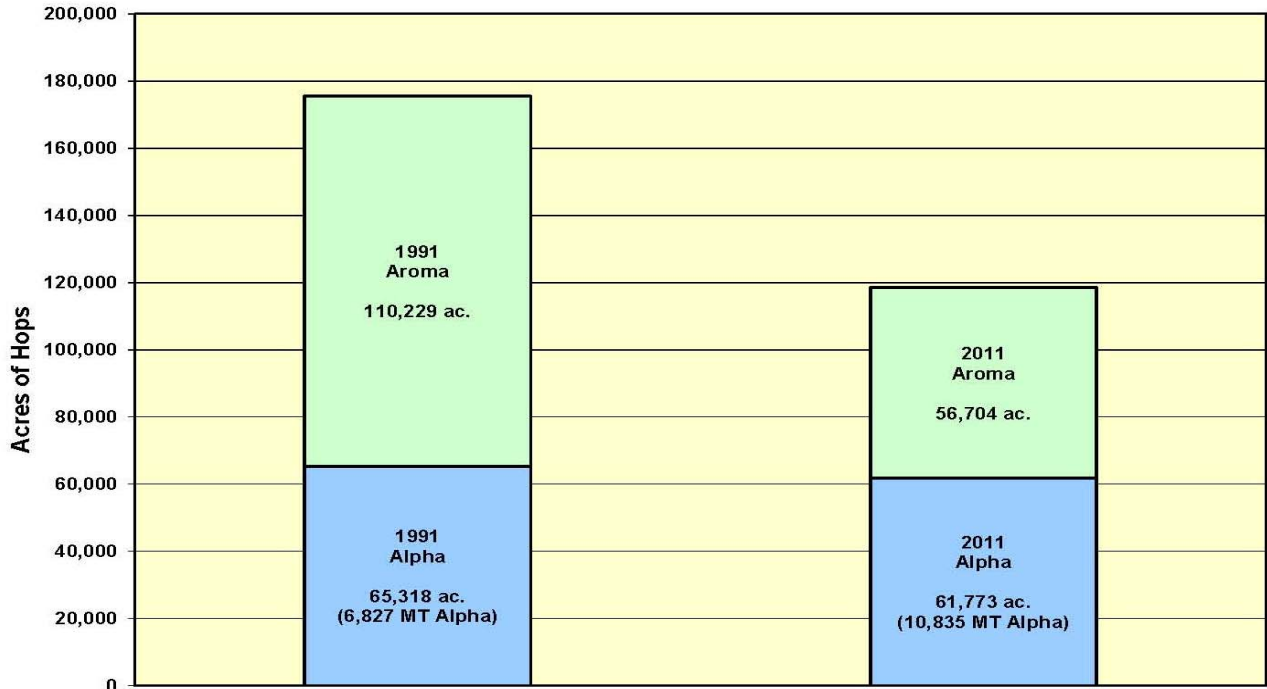
*Figures presented in the chart are the result of dividing the estimated MT Alpha by MT Hops for each year. This does not represent an estimate based on any type of analytical procedure.

WORLD ALPHA PRODUCTION & DEMAND 2000 – 2011 (12 YEARS)



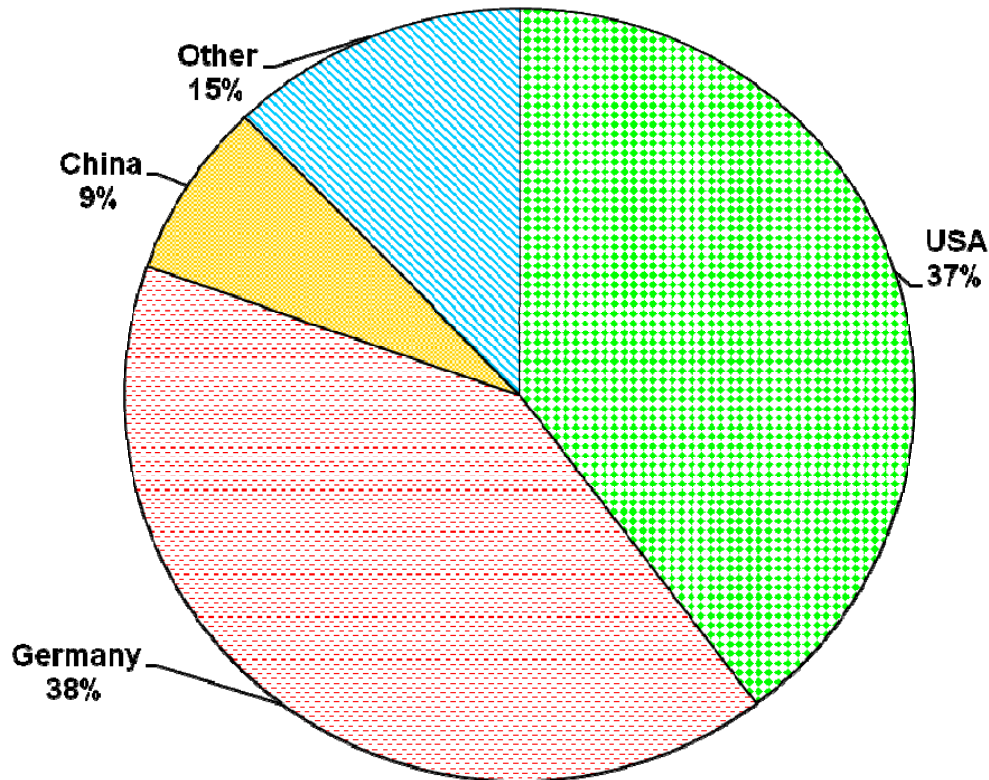
SOURCE: Barth Report. Prepared by HGA.

**COMPOSITION OF WORLD HOP ACREAGE
1991 VERSUS 2011**



SOURCE: IHGC November Reports. Prepared by HGA.

WORLD'S LARGEST ALPHA PRODUCERS - 2011



SOURCE: IHGC November Reports, MT Alpha. Prepared by HGA.

WORLD HOP ACREAGE & PERCENT SHARE (acres)

COUNTRY	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Germany	45,318 33%	40,879 32%	43,168 36%	42,404 34%	41,247 36%	41,376 34%	43,269 33%	43,902 33%	44,749 36%	43,818 37%
UK-England	4,681 3%	3,538 3%	3,354 2.7%	2,932 2%	2,609 2%	2,619 2%	2,718 2%	2,669 2%	2,669 2%	2,570 2%
Czech Rep.	14,735 11%	14,417 11%	14,420 12%	14,010 11%	13,109 12%	12,832 11%	12,664 10%	12,479 9%	12,398 10%	10,952 9%
Europe (rest)	23,616 17%	22,217 18%	20,666 17.20%	20,236 16%	19,253 17%	17,313 14%	17,236 13%	16,222 12%	16,186 13%	13,178 11%
USA	29,309 22%	28,669 23%	28,020 23.30%	29,188 24%	29,435 26%	30,911 25%	39,263 29%	40,126 30%	31,247 25%	30,016 25%
China	13,930 10%	13,931 11%	11,697 9.70%	11,846 10%	4,910 4%	13,912 11%	14,322 11%	14,322 11%	14,322 11%	14,322 12%
World (rest)	4,364 3%	3,211 3%	3,607 3%	3,354 3%	2,853 3%	3,047 2%	3,633 3%	3,991 3%	3,941 3%	3,620 3%
World Totals	135,944	126,862	119,943	123,609	113,417	122,010	133,105	133,711	125,512	118,476

SOURCE: IHGC Economic Commission November 2011 report. Prepared by HGA.

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

COUNTRY	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Germany	69,444 34%	55,115 30%	73,854 36.30%	75,397 37%	62,831 35%	70,854 35%	87,104 36%	68,894 28%	75,177 34%	82,673 38%
England	5,849 3%	4,202 2%	3,525 1.70%	3,732 2%	3,109 2%	3,108 2%	2,976 1%	3,197 1%	3,197 1%	3,351 2%
Czech	13,668 7%	11,219 6%	13,889 6.80%	15,238 8%	11,530 6%	12,414 6%	14,771 6%	14,109 6%	16,204 7%	13,779 6%
Europe (rest)	18,178 9%	20,388 11%	23,745 11.60%	24,960 12%	21,312 12%	20,891 10%	23,115 9%	22,780 9%	21,398 10%	17,077 8%
USA	58,336 28%	54,565 30%	55,200 27%	51,796 26%	53,815 30%	58,989 29%	76,235 31%	91,491 38%	64,954 29%	64,992 30%
China	31,224 15%	30,662 17%	25,882 12.70%	23,315 12%	20,944 12%	29,762 15%	35,494 14%	35,494 15%	35,494 16%	29,982 14%
World (rest)	9,332 5%	8,013 4%	7,095 3.5%	6,682 3%	5,227 3%	5,489 3%	5,324 2%	6,927 3%	7,068 3%	5,939 3%
World Totals	206,031	184,164	203,259	201,122	178,768	201,507	245,019	242,892	223,492	217,793

SOURCE: IHGC Economic Commission November 2011 report. Prepared by HGA.

MARCH 1 & SEPTEMBER 1 U.S. HOP STOCKS (15 YEARS)

Year	MARCH 1			SEPTEMBER 1		
	Brewer	Dealer / Grower	TOTAL	Brewer	Dealer / Grower	TOTAL
1997	53,000	26,000	79,000	44,500	17,500	62,000
1998	50,500	25,000	75,500	41,000	14,000	55,000
1999	50,000	25,000	75,000	39,500	14,500	54,000
2000	43,500	21,000	64,500	37,500	10,500	48,000
2001	44,500	22,500	67,000	38,000	16,000	54,000
2002	45,000	44,000	89,000	30,000	35,000	65,000
2003	41,000	41,000	82,000	34,000	35,000	69,000
2004	37,000	48,000	85,000	30,000	31,000	61,000
2005	43,000	33,000	76,000	33,000	27,000	60,000
2006	39,000	30,000	69,000	35,000	14,000	49,000
2007	42,000	28,000	70,000	31,000	16,000	47,000
2008	36,000	30,000	66,000	29,000	18,000	47,000
2009	40,000	42,000	82,000	40,000	25,000	65,000
2010	47,000	55,000	102,000	45,000	38,000	83,000
2011	54,000	55,000	109,000	46,000	37,000	83,000

SOURCE: USDA NASS. Prepared by HGA.

Includes equivalent pounds of dry hops held in form of extract or pellets. These numbers include all stocks held by growers, dealers or brewers that are physically stored on US soil at the time of the report, including both domestic and foreign hops.

U.S. IMPORTS OF HOPS (FIVE YEARS)
(In pounds; extract converted at 4:1 ratio)

2010/11 Rank	Country	2006/07 (Sep-Aug)	2007/08 (Sep-Aug)	2008/09 (Sep-Aug)	2009/10 (Sep-Aug)	2010/11 (Sep-Aug)
1	Germany	7,973,238	7,484,694	8,133,073	4,753,166	4,673,359
2	United Kingdom	613,326	1,762,155	804,026	792,782	858,701
3	New Zealand	124,561	107,365	292,553	369,274	559,533
4	Australia	450,845	783,302	1,533,976	569,013	372,802
5	Slovenia	106,704	175,047	372,361	397,493	102,956
6	Czech Republic	69,005	119,491	130,514	162,481	76,721
7	Belgium-Luxembourg	7,055	0	48,502	9,700	16,755
8	France	9,480	142,198	136,246	202,384	16,535
9	Switzerland	0	0	0	0	8,818
10	Ethiopia	3,307	8,598	661	0	2,425
11	Poland	25,353	7,055	7,275	9,700	1,984
12	Canada	0	0	0	0	1,764
13	China	119,931	13,228	2,205	13,669	1,764
14	Argentina	90,830	145,946	882	0	882
15	Italy	0	38,801	19,401	0	882
16	Austria	661	0	0	0	0
17	Hong Kong	0	2,205	0	0	0
18	Israel	0	0	0	882	0
19	Somalia	0	0	0	1,543	0
20	Spain	0	1,764	0	0	0
21	Venezuela	0	95,240	0	0	0
22	Vietnam	0	661	0	0	0
	Grand Total	9,594,297	10,887,749	11,481,675	7,282,089	6,695,880

Source: USDA Foreign Agricultural Service - Global Agricultural Trade System (GATS)

<http://www.fas.usda.gov/gats/default.aspx>

Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS, TOP 40 COUNTRIES (2006/07 through 2010/11)
(In pounds; extract converted at 4:1 ratio)

2010/11 Rank	Country	2006/07 (Sep-Aug)	2007/08 (Sep-Aug)	2008/09 (Sep-Aug)	2009/10 (Sep-Aug)	2010/11 (Sep-Aug)
1	Mexico	2,985,941	4,295,046	9,408,227	8,079,721	8,515,355
2	Belgium-Luxembourg	5,472,535	4,790,645	8,837,230	8,637,932	8,307,018
3	United Kingdom	3,621,975	5,784,048	5,594,671	6,214,611	6,928,247
4	Germany	6,689,927	6,561,398	10,149,862	5,988,196	4,161,005
5	Brazil	4,159,461	3,563,552	4,905,285	5,345,769	3,950,684
6	Colombia	2,063,086	2,066,613	2,379,008	3,252,039	3,210,151
7	China	3,629,691	4,471,857	2,303,169	4,039,089	3,205,080
8	Japan	1,628,775	1,772,296	2,259,738	2,440,958	2,754,456
9	Hong Kong	951,956	1,815,066	1,077,399	1,319,026	2,119,083
10	Canada	2,538,402	5,083,639	5,077,907	4,071,497	2,036,189
11	Venezuela	2,432,140	1,255,533	687,181	718,927	1,682,788
12	Korea, South	661,828	1,349,670	1,197,771	1,738,124	1,541,693
13	Argentina	1,466,956	1,387,810	921,532	947,326	1,231,282
14	Peru	784,405	1,504,655	1,487,679	1,144,199	1,075,194
15	Vietnam	422,406	570,777	741,194	1,027,354	963,200
16	Australia	951,956	609,578	1,263,910	1,507,521	917,784
17	Dominican Republic	726,644	662,489	714,518	591,280	861,567
18	Philippines	649,923	657,859	841,725	1,399,715	836,654
19	Chile	660,946	651,686	821,883	503,977	635,593
20	Russia	761,477	1,586,667	582,020	1,205,708	589,296
21	South Africa	2,646	684,315	259,925	426,815	578,713
22	India	399,478	546,526	646,616	879,644	523,377
23	Malaysia	173,063	265,437	203,707	268,964	502,874
24	Ecuador	369,936	659,182	585,989	1,089,745	466,719
25	Guatemala	198,416	205,912	115,522	386,691	463,853
26	Nigeria	1,060,864	561,738	302,033	642,868	435,633
27	Thailand	859,582	1,154,120	1,976,224	578,052	423,508
28	Ireland	470,466	488,985	318,127	37,920	298,947
29	Panama	126,104	201,503	202,384	83,555	266,539
30	Cameroon	211,644	155,205	45,856	155,867	220,462
31	Bolivia	250,004	115,081	145,064	208,998	195,330
32	Ghana	201,062	268,964	143,741	51,588	186,070
33	Costa Rica	82,673	73,414	130,734	221,124	163,803
34	Mozambique	0	14,110	0	107,586	140,434
35	El Salvador	106,704	326,284	216,494	114,420	137,789
36	Tanzania	0	0	132,498	40,345	122,357
37	Singapore	246,036	289,246	210,982	138,450	114,640
38	Honduras	274,255	312,175	295,419	197,975	113,759
39	Haiti	123,459	97,003	176,370	130,734	107,586
40	Trinidad and Tobago	67,902	38,801	59,966	46,738	100,531
	All Other Countries	3,664,083	6,011,785	3,675,988	1,932,793	1,126,782
	Grand Total	52,148,805	62,910,670	71,095,552	67,913,841	62,212,025

Source: USDA Foreign Agricultural Service - Global Agricultural Trade System (GATS)

<http://www.fas.usda.gov/gats/default.aspx>

Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS BY PRODUCT (TOP 40) – 2010/11
(In pounds; extract is converted to fresh hop equivalent at a ratio of 4:1)

2010/11 Rank	Country	PELLETS	FRESH/DRIED	GROUND	EXTRACT	TOTAL
1	Mexico	145,285	878,101	18,298	7,473,671	8,515,355
2	Belgium-Luxembourg	11,244	1,065,494	0	7,230,280	8,307,018
3	United Kingdom	110,231	1,144,199	0	5,673,817	6,928,247
4	Germany	182,763	982,600	0	2,995,641	4,161,005
5	Brazil	0	1,589,974	0	2,360,710	3,950,684
6	Colombia	0	1,481,727	0	1,728,424	3,210,151
7	China	0	332,898	0	2,872,182	3,205,080
8	Japan	360,676	1,656,333	5,512	731,935	2,754,456
9	Hong Kong	0	126,986	0	1,992,097	2,119,083
10	Canada	14,110	1,607,170	64,816	350,094	2,036,189
11	Venezuela	0	0	220	1,682,568	1,682,788
12	Korea, South	2,205	100,310	0	1,439,178	1,541,693
13	Argentina	0	374,124	0	857,157	1,231,282
14	Peru	0	382,943	0	692,252	1,075,194
15	Vietnam	0	45,195	0	918,005	963,200
16	Australia	25,133	73,414	0	819,238	917,784
17	Dominican Republic	0	0	0	861,567	861,567
18	Philippines	43,211	323,418	0	470,026	836,654
19	Chile	1,102	54,675	441	579,375	635,593
20	Russia	0	69,887	0	519,409	589,296
21	South Africa	10,803	26,896	56,879	484,135	578,713
22	India	0	323,198	0	200,180	523,377
23	Malaysia	1,323	57,100	0	444,452	502,874
24	Ecuador	0	203,046	0	263,673	466,719
25	Guatemala	0	0	0	463,853	463,853
26	Nigeria	0	0	0	435,633	435,633
27	Thailand	18,298	18,960	0	386,250	423,508
28	Ireland	15,873	15,873	0	267,200	298,947
29	Panama	2,425	47,399	57,982	158,733	266,539
30	Cameroon	0	0	0	220,462	220,462
31	Bolivia	0	178,574	0	16,755	195,330
32	Ghana	0	0	0	186,070	186,070
33	Costa Rica	0	1,543	0	162,260	163,803
34	Mozambique	0	48,722	0	91,712	140,434
35	El Salvador	0	34,613	0	103,176	137,789
36	Tanzania	0	122,357	0	0	122,357
37	Singapore	0	0	0	114,640	114,640
38	Honduras	0	7,937	0	105,822	113,759
39	Haiti	0	0	0	107,586	107,586
40	Trinidad and Tobago	2,646	0	0	97,885	100,531
	All Other Countries	46,077	183,645	106,924	790,137	1,126,782
	Grand Total	993,403	13,559,311	311,072	47,348,239	62,212,025

Source: USDA Foreign Agricultural Service - Global Agricultural Trade System (GATS)
<http://www.fas.usda.gov/gats/default.aspx>

Prepared by Bryant Christie Inc.

WORLD BEER PRODUCTION (FIVE YEARS - MILLION HL)

	2007	2008	2009	2010	2011
Russia	116.0	115.3	108.5	103.0	103.0
Germany	103.9	102.8	102.9	98.3	97.0
Great Britain	50.5	49.5	45.2	45.0	44.9
Poland	32.5	35.6	32.3	33.5	34.9
Spain	33.2	33.4	33.8	32.7	33.1
Ukraine	31.5	32.0	30.0	30.9	30.0
Netherlands	28.0	26.8	25.4	24.0	23.6
Belgium	18.6	17.8	18.0	18.0	17.5
Czech Republic	19.8	19.8	20.0	17.0	17.1
Romania	19.5	20.8	17.2	15.5	15.0
France	15.1	14.4	14.2	14.3	14.5
Italy	13.5	12.8	12.4	12.3	12.5
Turkey	9.2	9.9	9.4	9.7	9.9
Austria	9.0	8.5	8.9	9.0	9.0
Portugal	8.2	8.2	7.8	8.3	8.5
Ireland	9.3	8.9	8.5	8.4	8.4
Other Europe	70.8	69.5	64.5	49.4	47.5
Total Europe	588.6	586.0	559.4	544.3	542.4
USA	233.4	234.1	228.5	228.4	223.8
Brazil	96.0	106.3	106.7	113.9	116.2
Mexico	81.0	82.3	82.0	80.0	79.8
Canada	23.9	23.7	23.2	22.4	22.2
Venezuela	26.3	24.0	23.2	22.0	22.1
Colombia	19.0	19.0	19.0	19.5	19.8
Argentina	14.5	15.5	16.5	17.0	17.5
Other Americas	38.9	41.8	35.1	39.2	37.6
Total Americas	533.0	546.7	541.1	545.2	543.6
China	393.0	406.9	422.6	449.0	460.0
Japan	62.7	61.0	59.7	57.0	55.0
Vietnam	18.4	18.5	21.0	25.0	27.0
Thailand	22.0	20.7	18.5	19.2	19.5
South Korea	18.0	18.6	18.5	18.5	19.0
India	9.0	13.4	15.0	14.8	17.0
Philippines	13.7	13.3	14.2	15.2	15.6
Other Asia	30.1	32.4	43.5	76.2	92.3
Total Asia	557.9	574.8	593.5	626.2	642.3
South Africa	26.5	25.9	26.2	29.5	30.0
Nigeria	12.3	15.2	16.0	17.5	18.0
Other Africa	39.6	45.0	50.6	58.7	62.3
Total Africa	78.4	86.1	92.1	100.2	103.8
Australia	16.9	17.0	17.0	17.2	17.5
New Zealand	3.4	3.2	3.4	3.2	3.2
Oceania	1.2	1.2	1.2	1.2	1.2
Total Australia	21.5	21.4	21.6	21.6	21.9
WORLD TOTALS	1,779.4	1,815.0	1,807.7	1,837.5	1,854.0

Source: Hopsteiner – Guidelines for Hop Buying 2011. Prepared by HGA.

WORLD BEER PRODUCTION BY BREWERY (TOP 10) - 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 BY BREWERY (TOP 10) - 2010 (MILLION HL)

Brewery	2010 Production	2010 % Share
ABInBev	358.7	19.4%
SABMiller	172.3	9.3%
Heineken*	145.9	7.9%
Carlsberg	114.0	6.2%
China Resources	93.3	5.1%
Tsingtao	64.0	3.5%
Grupo Modelo	51.9	2.8%
Yanjing	50.3	2.7%
Molson-Coors	48.7	2.6%
Top 10 total	1,099.1	59.5%

*Heineken acquired Femsa in Jan. 2009.

The top 3 brewing groups control 36.6% of the market share.

The top 40 brewing groups worldwide represent 82.2% market share.

Source: Barth-Haas Group Beer Production 2010.

Prepared by HGA.