



2008

STATISTICAL REPORT

RELEASED JANUARY 2009

PRESENTED BY
HOP GROWERS OF AMERICA



TABLE OF CONTENTS

	Page
U.S. HOP ACREAGE BY STATE AND VARIETY 2004-2008	4
U.S. HOP YIELDS BY STATE AND VARIETY 2004-2008	5
<u>U.S. HOP PRODUCTION BY STATE AND VARIETY 2004-2008</u>	<u>6</u>
U.S. HOP ACREAGE BY STATE 1998 – 2008	7
U.S. AVERAGE HOP YIELDS 1998 – 2008	7
<u>U.S. HOPS: SEASON AVERAGE PRICE & TOTAL CROP VALUE</u>	<u>7</u>
2008 U.S. HOP INSPECTION REPORT	8
U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE 1998 – 2008	8
<u>IHGC AROMA ACREAGE 2004 – 2008</u>	<u>9</u>
IHGC ALPHA ACREAGE 2004 – 2008	9-10
IHGC TOTAL ACREAGE 2004 – 2008	10
<u>2008 IHGC HOP ACREAGE AND PRODUCTION</u>	<u>11</u>
CHART - U.S. TOTAL ACREAGE 1989 - 2008	12
CHART - U.S. AVERAGE YIELD PER ACRE 1989 – 2008	12
<u>CHART - U.S. TOTAL PRODUCTION 1989 - 2008</u>	<u>13</u>
CHART – WORLD ALPHA PRODUCTION & DEMAND 1997-2008	13
CHART - SEVEN MOST WIDELY-PLANTED U.S. VARIETIES	14
<u>CHART - COMPOSITION OF WORLD HOP ACREAGE 1991 VERSUS 2008</u>	<u>14</u>
CHART – WORLD’S LARGEST ALPHA PRODUCERS	15
U.S. & GERMAN ALPHA ACID PRODUCTION 1999 – 2008	15
<u>WORLD HOP ACREAGE & PERCENT SHARE 1999 – 2008</u>	<u>16</u>
WORLD HOP PRODUCTION & PERCENT SHARE 1999 – 2008	16
MARCH 1 & SEPTEMBER 1 U.S. HOP STOCKS 1993– 2008	17
<u>U.S. HOP IMPORTS BY COUNTRY 2003-04 through 2007-08</u>	<u>17</u>
U.S. HOP EXPORTS BY COUNTRY 2003-04 through 2007-08	18
U.S. HOP EXPORTS BY PRODUCT 2008	19
<u>WORLD BEER PRODUCTION 2005-2008</u>	<u>20</u>

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

Report prepared by: Ann George for Hop Growers of America, Inc.
P.O. Box 1207, Moxee, WA. 98936, USA
Telephone (509) 248-7043 Fax: (509) 457-8561
E-mail: info@usahops.org Website: www.usahops.org

U.S. HOP ACREAGE BY STATE AND VARIETY 2004 – 2008

STATE & VARIETY	ACRES HARVESTED					2007-08
	2004	2005	2006	2007	2008	% +/-
IDAHO						
Total Idaho	3,253	3,287	2,797	2,896	3,933	35.81%
OREGON						
Cascade	91	62	*	*	76	
Glacier	243	231	*	*	*	
Golding	105	105	117	115	135	17.39%
Millennium	264	295	258	294	343	16.67%
Mt. Hood	215	219	113	178	186	4.49%
Nugget	1,286	1,363	1,500	1,675	2,135	27.46%
Perle	259	*	*	*	*	
Sterling	222	276	109	95	95	0.00%
Willamette	2,175	2,273	2,301	2,396	2,593	8.22%
Other	247	339	638	517	807	56.09%
Total Oregon	5,107	5,163	5,036	5,270	6,370	20.87%
WASHINGTON						
Ahtanum	*	131	40	42	*	
Apollo®	*	*	*	*	698	
Bravo®	*	*	*	*	222	
Cascade	1,422	1,168	1,116	1,303	2,073	59.09%
Centennial	*	112	*	*	253	
Chelan	201	212	505	505	739	46.34%
Chinook	492	489	365	311	285	-8.36%
Cluster	449	463	352	366	420	14.75%
Columbus/Tomahawk®	3,029	2,812	2,772	3,342	4,891	46.35%
Galena	3,417	3,869	3,809	3,030	2,584	-14.72%
Glacier	*	48	17	21	56	166.67%
Golding	36	37	53	52	38	-26.92%
Hallertauer	46	48	49	56	*	
Millennium	1,124	1,115	910	728	716	-1.65%
Mt. Hood	39	51	44	43	29	-32.56%
Northern Brewer	65	*	*	*	*	
Nugget	807	1,062	1,100	1,093	1,086	-0.64%
Perle	47	*	*	*	*	
Simcoe®	*	*	*	*	129	
Sterling	*	93	62	*	*	
Summit®#	*	*	66	632	2,403#	280.22%
Super Galena®	*	*	*	*	793	
Vanguard	*	*	*	64	*	
Willamette	3,542	4,102	4,554	4,462	4,664	4.53%
YCR4 - Palisade®	*	54	54	91	307	237.36%
YCR5 - Warrior®	793	584	421	339	394	16.22%
Zeus	2,903	3,736	3,982	4,737	6,779	43.11%
Other#	970	908	1,261	1,528	1,036#	-32.20%
Total Washington	19,382	21,013	21,532	22,745	30,595	34.51%
Total United States	27,742	29,463	29,365	30,911	40,898	32.31%

SOURCE: USDA-NASS. Prepared by HGA.

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

"Other", as published in the USDA-NASS December 2008 National Hop Report, reports 3,439 acres, which includes an estimated 2,403 acres of Summit variety in Washington, per the USDA-NASS June 2008 Crop Production Report (published June 10, 2008). HGA has included Summit as a separately reported variety in this chart for 2008, deducting that acreage from the "Other" acreage total reported by NASS.

U.S. HOP YIELDS BY STATE AND VARIETY 2004 – 2008

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2007-08
	2004	2005	2006	2007	2008	% +/-
IDAHO						
Total Idaho	1,588	1,640	1,613	1,417	1,841	29.92%
OREGON						
Cascade	1,393	1,365	*	*	1,068	
Glacier	1,521	1,330	*	*	*	
Golding	1,309	1,017	1,371	1,403	1,307	-6.84%
Millennium	2,030	1,876	2,540	2,323	2,179	-6.20%
Mt. Hood	1,620	1,414	1,544	1,640	1,552	-5.37%
Nugget	2,229	2,046	2,164	2,231	1,758	-21.20%
Perle	1,327	*	*	*	*	
Sterling	1,209	1,451	1,766	1,665	1,667	0.12%
Willamette	1,507	1,385	1,459	1,577	1,539	-2.41%
Other	1,370	1,048	1508	1,416	992	-29.94%
Total Oregon	1,686	1,560	1,757	1,811	1,569	-13.36%
WASHINGTON						
Ahtanum	*	1,986	2,110	1,964	*	
Apollo®			*	*	2,229	
Bravo®			*	*	2,340	
Cascade	2,006	2,036	1,954	2,031	1,781	-12.31%
Centennial	*	1,375	*	*	1,452	
Chelan	2,482	2,244	2,187	2,364	2,178	-7.87%
Chinook	1,900	1,844	1,871	1,818	1,775	-2.37%
Cluster	2,034	1,782	2,184	2,030	2,038	0.39%
Columbus/Tomahawk®	2,557	2,516	2,660	2,533	2,585	2.05%
Galena	1,860	1,737	1,820	1,776	1,826	2.82%
Glacier	*	1,063	1,441	1,619	1,795	10.87%
Golding	989	886	992	1,500	1,385	-7.67%
Hallertauer	1,057	967	812	763	*	
Millennium	2,339	1,908	2,324	2,350	2,440	3.83%
Mt. Hood	1,387	1,267	1,109	1,316	1,572	19.45%
Northern Brewer	2,191	*	*	*	*	
Nugget	2,073	1,727	1,841	1,909	2,068	8.33%
Perle	1,245	*	*	*	*	
Simcoe®	*	*	*	*	1,758	
Sterling	*	*	1,419	*	*	
Summit®#	*	*	1,864	1,822	1,724#	-5.38%
Super Galena®	*	*	*	*	2,104	
Vanguard	*	*	*	1,470	*	
Willamette	1,411	1,333	1,222	1,318	1,351	2.50%
YCR4 - Palisade®	*	2,759	2,998	2,519	2,091	-16.99%
YCR5 - Warrior®	2,300	1,830	2,159	1,903	1,846	-3.00%
Zeus	3,125	2,255	2,962	2,839	2,618	-7.78%
Other#	1,641	1,576	1,775	1,355	1,233#	-9.00%
Total Washington	2,137	1,878	2,058	2,049	2,072	1.12%
Total United States	1,990	1,796	1,964	1,949	1,971	1.13%

SOURCE: USDA-NASS and American Dwarf Hop Association. Prepared by HGA.

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

"Other", as reported in the USDA-NASS December 2008 National Hop Report, includes the Summit variety in Washington for 2008, resulting in an average reported WA yield for "Other" varieties of 1,576 pounds per acre. However, the estimated 2008 WA yield for Summit is reported separately by HGA in this chart, using estimates provided by the American Dwarf Hop Association. The average WA yield for remaining "Other" varieties is recalculated accordingly.

U.S. HOP PRODUCTION BY STATE AND VARIETY 2004 – 2008

STATE & VARIETY	HOP PRODUCTION (POUNDS)					2007-08
	2004	2005	2006	2007	2008	% +/-
IDAHO						
Total Idaho	5,165,000	5,390,900	4,510,400	4,104,900	7,239,800	76.37%
OREGON						
Cascade	126,800	84,600	*	*	81,200	
Glacier	369,600	307,200	*	*	*	
Golding	137,400	106,800	160,400	161,400	176,400	9.29%
Millennium	536,000	553,400	744,200	682,900	747,400	9.45%
Mt. Hood	348,400	309,600	248,600	292,000	288,600	-1.16%
Nugget	2,866,000	2,788,800	3,440,800	3,737,500	3,753,200	0.42%
Perle	343,800	*	*	*	*	
Sterling	268,400	400,400	217,200	158,200	158,400	0.13%
Willamette	3,277,200	3,147,800	3,357,200	3,778,800	3,989,600	5.58%
Other	338,400	355,400	680,100	732,000	802,800	9.67%
Total Oregon	8,612,000	8,054,000	8,848,500	9,542,800	9,997,600	4.77%
WASHINGTON						
Ahtanum	*	99,300	84,400	82,500	*	
Apollo®			*	*	1,555,800	
Bravo®			*	*	519,500	
Cascade	2,852,500	2,378,000	2,180,700	2,646,400	3,692,000	39.51%
Centennial	*	154,000	*	*	367,400	
Chelan	498,000	475,700	1,104,400	1,193,800	1,609,500	34.82%
Chinook	934,800	901,700	682,900	565,400	505,900	-10.52%
Cluster	913,300	825,100	768,800	743,000	856,000	15.21%
Columbus/Tomahawk®	7,745,200	7,075,000	7,373,500	8,465,300	12,643,200	49.35%
Galena	6,355,600	6,720,500	6,932,400	5,381,300	4,718,400	-12.32%
Glacier	*	51,000	24,500	34,000	100,500	195.59%
Golding	35,600	32,800	52,600	78,000	52,600	-32.56%
Hallertauer	48,600	46,400	39,800	42,700	*	
Millennium	2,629,000	2,127,400	2,114,800	1,710,800	1,747,000	2.12%
Mt. Hood	54,100	64,800	48,800	56,600	45,600	-19.43%
Northern Brewer	142,100	*	*	*	*	
Nugget	1,672,900	1,834,100	2,025,100	2,086,500	2,245,800	7.63%
Perle	58,500	*	*	*	*	
Simcoe®			*	*	226,800	
Sterling	*	142,000	88,000	*	*	
Summit®#	*	*	123,000	1,151,500	4,143,000#	259.79%
Super Galena®			*	*	1,668,500	
Vanguard	*	*	*	94,100	*	
Willamette	4,997,800	5,468,000	5,565,000	5,880,900	6,301,100	7.15%
YCR4 - Palisade®	*	149,000	161,900	229,200	641,900	180.06%
YCR5 - Warrior®	1,823,900	1,068,700	908,900	645,100	727,300	12.74%
Zeus	9,071,900	8,424,700	11,794,700	13,448,300	17,747,400	31.97%
Other#	1,591,900	1,431,400	2,238,700	2,070,000	1,277,500#	-38.29%
Total Washington	41,426,900	39,469,600	44,312,900	46,605,400	63,392,700	36.02%
Total United States	55,203,900	52,914,500	57,686,700	60,253,100	80,630,100	33.82%

SOURCE: USDA-NASS and American Dwarf Hop Association. Prepared by HGA.

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

"Other", as published in the USDA-NASS December 2008 National Hop Report, includes the Summit variety in Washington. HGA has included Summit as a separately reported variety for 2008 in this chart, using an estimated production figure of 4,143,000 pounds, as provided by the American Dwarf Hop Association. This amount has been deducted from the "Other" category production that was reported in December 2008 by USDA-NASS.

U.S. HOP ACREAGE BY STATE 1998 – 2008 (IN ACRES)

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
1998	26,573	6,161	3,909	36,643
1999	25,076	5,822	3,362	34,260
2000	26,980	5,819	3,321	36,120
2001	26,339	6,103	3,469	35,911
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

SOURCE: USDA-NASS. Prepared by HGA.

U.S. AVERAGE HOP YIELD 1998 – 2008

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL U.S.
1998	1,686	1,660	1,159	1,625
1999	1,980	1,730	1,408	1,884
2000	1,937	1,785	1,484	1,871
2001	1,928	1,875	1,329	1,861
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

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)
1993	\$1.72	\$1.95	\$1.77	\$1.76	76,144	\$133,965
1994	\$1.77	\$1.96	\$1.79	\$1.81	74,560	\$134,701
1995	\$1.68	\$1.90	\$1.61	\$1.71	78,852	\$135,087
1996	\$1.63	\$1.81	\$1.49	\$1.65	74,970	\$123,530
1997	\$1.60	\$1.68	\$1.41	\$1.60	74,872	\$119,840
1998	\$1.64	\$1.98	\$1.55	\$1.69	59,548	\$100,728
1999	\$1.63	\$2.04	\$1.61	\$1.69	64,455	\$109,099
2000	\$1.82	\$2.19	\$1.78	\$1.87	67,576	\$126,217
2001	\$1.81	\$2.15	\$1.59	\$1.91	66,832	\$123,843
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	\$169,310
2008	\$3.99	\$3.80	\$4.00	\$3.97	80,630	\$319,887

SOURCE: USDA-NASS. Prepared by HGA.

2008 HOP INSPECTION REPORT

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

YEAR	WASHINGTON (%)	OREGON (%)	IDAHO (%)	TOTAL (%)
2004	182,727 (0.08)	42,636 (0.28)	25,121 (0.01)	250,484 (0.10)
2005	195,759 (0.09)	40,256 (0.18)	25,601 (0.08)	261,616 (0.15)
2006	218,805 (0.09)	43,929 (0.16)	22,244 (0.14)	284,978 (0.11)
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)

TABLE 2. Number of Bales in Each Leaf & Stem Category – 2008

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	208,590	83,917	9,065	547	3	-	-	-	302,122
OR	36,872	7,392	784	129	61	83	-	-	45,321
ID	20,750	647	-	-	-	-	-	-	21,397
Total	266,212	91,956	9,849	676	64	83	-	-	368,840
% of Total	72%	25%	3%	0%	0%	0%	0%	0%	100%

TABLE 3. Number of Bales in Each Seed Category – 2008

	0%	1%	2%	3%	4%	5%	6%	7+%	TOTAL
WA	91,906	61,955	48,052	36,354	23,780	18,916	9,134	12,025	302,122
OR	19,421	9,645	5,554	1,414	2,286	1,277	2,253	3,471	45,321
ID	18,657	1,235	712	200	398	195	-	-	21,397
Total	129,984	72,835	54,318	37,968	26,464	20,388	11,387	15,496	368,840
% of Total	35%	20%	15%	10%	7%	6%	3%	4%	100%

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

U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE 1998 – 2008

Year	WASHINGTON	OREGON	IDAHO	U.S. AVERAGE %	
	Leaf & Stem	Leaf & Stem	Leaf & Stem	Leaf & Stem	Seed Content
1998	0.11	0.21	0.09	0.12	0.54
1999	0.06	0.21	0.05	0.08	1.15
2000	0.11	0.23	0.01	0.12	1.18
2001	0.08	0.14	0.04	0.09	1.06
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

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

IHGC AROMA ACREAGE 2004 – 2008

COUNTRY	AROMA ACREAGE (IN ACRES)					2008
	2004	2005	2006	2007	2008	% +/-
Australia*	7	16	15	22	22	0.00%
Austria				462	482	4.28%
Belgium*	86	121	86	106	126	18.60%
Bulgaria	178	178	178	178	178	0.00%
China	464	1,331	1,352	1,359	1,433	5.45%
Czech Rep.	13,227	13,323	12,899	12,664	12,486	-1.40%
France	1,717	1,781	1,772	1,814	1,814	0.00%
Germany	23,122	24,166	24,622	24,998	25,386	1.55%
New Zealand	635	625	554	556	531	-4.44%
Poland	2,193	2,109	2,073	1,942	1,796	-7.51%
Portugal*	0	0	0	0	0	0.00%
Russia*	748	692	482	395	376	-5.00%
Serbia*	116	116	84	84	84	0.00%
Slovakia	865	865	865	741	531	-28.33%
Slovenia	3,623	3,433	3,459	3,415	3,810	11.58%
South Africa	0	0	0	0	0	0.00%
Spain*	0	0	0	0	0	0.00%
Ukraine	1,882	2,211	2,212	1,527	1,651	8.09%
UK - England	2,043	2,179	1,937	1,977	2,125	7.50%
USA	11,411	10,648	10,853	10,977	14,147	28.88%
IHGC Total	62,318	61,997	63,442	63,218	66,979	5.95%

*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 2004 – 2008

COUNTRY	ALPHA ACREAGE (IN ACRES)					2008
	2004	2005	2006	2007	2008	% +/-
Australia*	1,317	1,094	904	1,068	1,068	0.00%
Austria				32	37	15.38%
Belgium*	393	326	361	329	334	1.50%
Bulgaria	368	368	368	368	368	0.00%
China	11,234	9,540	3,558	12,553	12,889	2.68%
Czech Rep.	506	576	210	168	178	5.88%
France	91	100	96	91	94	2.70%
Germany	18,276	17,243	16,625	16,378	17,883	9.19%
New Zealand	408	371	319	309	371	20.00%
Poland	3,285	3,421	3,447	3,442	3,494	1.51%
Portugal*	91	91	91	91	91	0.00%
Russia*	524	652	556	168	168	0.00%

Serbia*	491	291	82	82	104	27.27%
Slovakia	0	0	0	0	0	0.00%
Slovenia	227	178	148	183	193	5.41%
South Africa	1,242	1,250	1,082	1,082	1,097	1.37%
Spain*	1,680	1,680	1,483	1,216	1,216	0.00%
Ukraine	1,218	1,405	1,406	1,021	830	-18.64%
UK - England	1,237	753	603	642	593	-7.69%
USA	16,608	18,540	18,582	19,934	25,116	25.99%
IHGC Total	56,229	57,776	49,923	59,158	66,124	11.78%

*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 2004 – 2008

COUNTRY	TOTAL ACREAGE (IN ACRES)					2008
	2004	2005	2006	2007	2008	% +/-
Australia*	1,323	1,109	899	1,090	1,090	0.00%
Austria				494	519	5.00%
Belgium*	487	447	447	435	460	5.68%
Bulgaria	546	546	546	546	546	0.00%
China	11,697	11,486	4,910	13,912	14,322	2.95%
Czech Rep.	14,420	14,010	13,109	12,832	12,664	-1.31%
France	1,944	1,978	1,871	1,905	1,910	0.26%
Germany	43,168	42,402	41,247	41,376	43,269	4.57%
New Zealand	1,042	995	872	865	902	4.29%
Poland	5,478	5,530	5,520	5,385	5,291	-1.74%
Portugal*	91	91	91	91	91	0.00%
Russia*	1,370	1,344	1,038	563	544	-3.51%
Serbia*	607	408	166	166	188	13.43%
Slovakia	865	865	865	741	531	-28.33%
Slovenia	3,982	3,732	3,608	3,598	4,003	11.26%
South Africa	1,242	1,250	1,082	1,082	1,097	1.37%
Spain*	1,680	1,680	1,483	1,216	1,216	0.00%
Ukraine	3,616	3,616	3,618	2,548	2,481	-2.62%
UK - England	3,354	2,932	2,609	2,619	2,718	3.77%
USA	28,020	29,188	29,435	30,911	39,263	27.02%
IHGC Total	119,943	123,609	113,417	122,376	133,106	8.77%

*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.

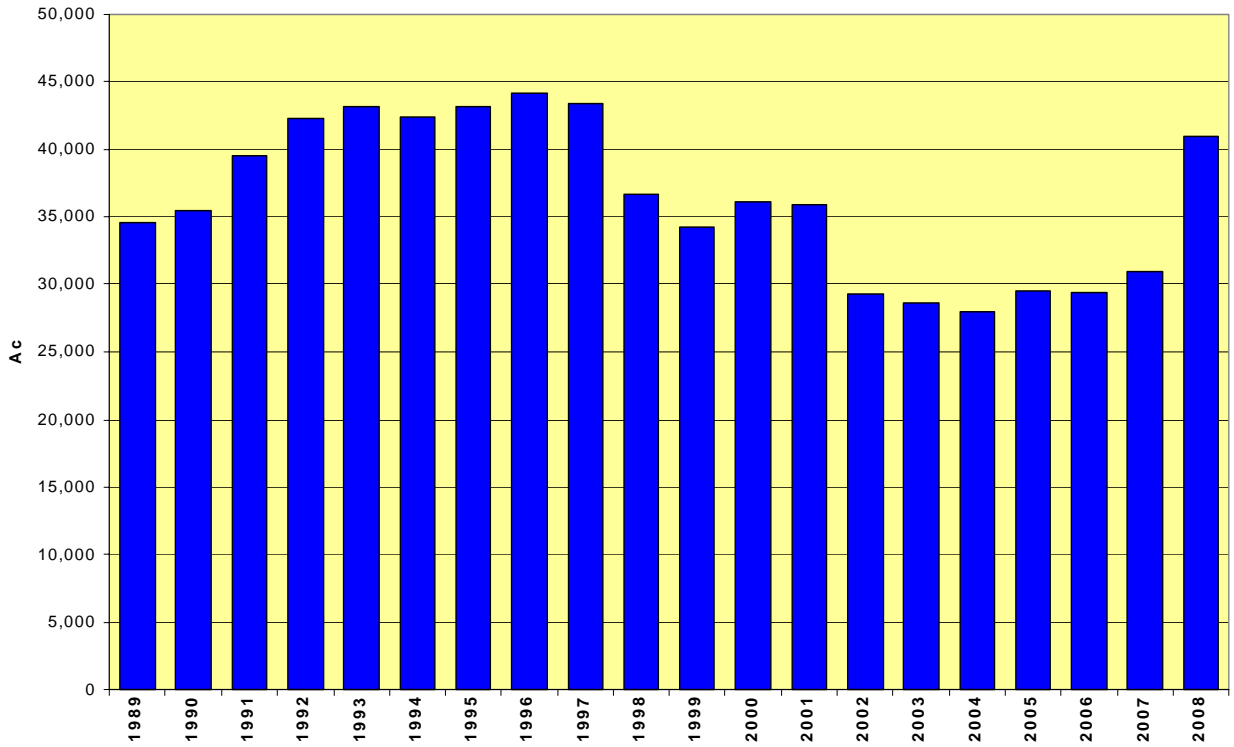
2008 IHGC HOP ACREAGE AND PRODUCTION

COUNTRY	HOP ACREAGE (acres)				HOP PRODUCTION (pounds)			
	AROMA	ALPHA	TOTAL	NEW	AROMA	ALPHA	TOTAL	Alpha MT.
Australia*	22	1,068	1,090	0	24,251	1,937,843	1,962,094	117
Austria	482	37	519	20	771,610	70,547	842,157	31
Belgium*	126	334	460	25	143,299	573,196	716,495	27
Bulgaria	178	368	546	37	224,869	529,104	753,973	33
China	1,433	12,889	14,322	8,829	3,527,360	31,966,700	35,494,060	860
Czech Rep.	12,486	178	12,664	519	14,396,038	374,782	14,770,820	300
France	1,814	94	1,910	77	3,093,054	145,504	3,238,557	39
Germany	25,386	17,883	43,269	2,928	47,112,302	39,991,444	87,103,746	4,100
New Zealand	531	371	902	62	947,978	661,380	1,609,358	75
Poland	1,796	3,494	5,291	0	2,028,232	5,149,946	7,178,178	222
Portugal*	0	91	91	0	0	125,662	125,662	6
Russia*	376	168	544	0	242,506	110,230	352,736	7
Serbia*	84	104	188	22	127,867	156,527	284,393	10
Slovakia	531	0	531	0	617,288	0	617,288	9
Slovenia	3,810	193	4,003	213	5,090,421	266,757	5,357,178	138
South Africa	0	1,097	1,097	0	0	1,399,921	1,399,921	79
Spain*	0	1,216	1,216	0	0	2,061,301	2,061,301	116
Ukraine	1,651	830	2,481	563	1,212,530	727,518	1,940,048	50
UK - England	2,125	593	2,718	99	2,160,508	815,702	2,976,210	99
USA	14,147	25,116	39,263	0	20,194,136	56,040,932	76,235,068	4,150
2008 IHGC Totals	66,979	66,124	133,106	13,393	101,914,249	143,104,995	245,019,244	10,468

SOURCE: November 2008 IHGC Economic Commission Report. Numbers may not total exactly due to rounding and standard/metric conversions.

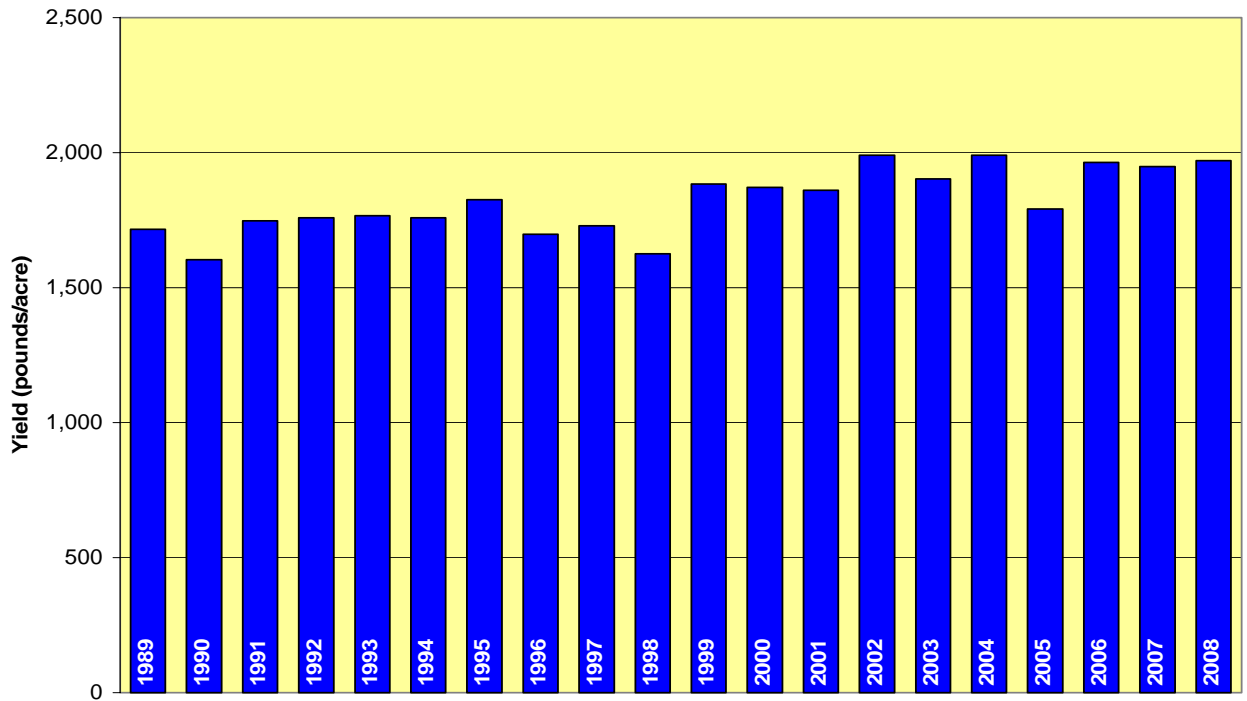
U.S. TOTAL HOP ACREAGE 1989 – 2008 (20 YEARS)

Source: USDA-NASS. Prepared by HGA.



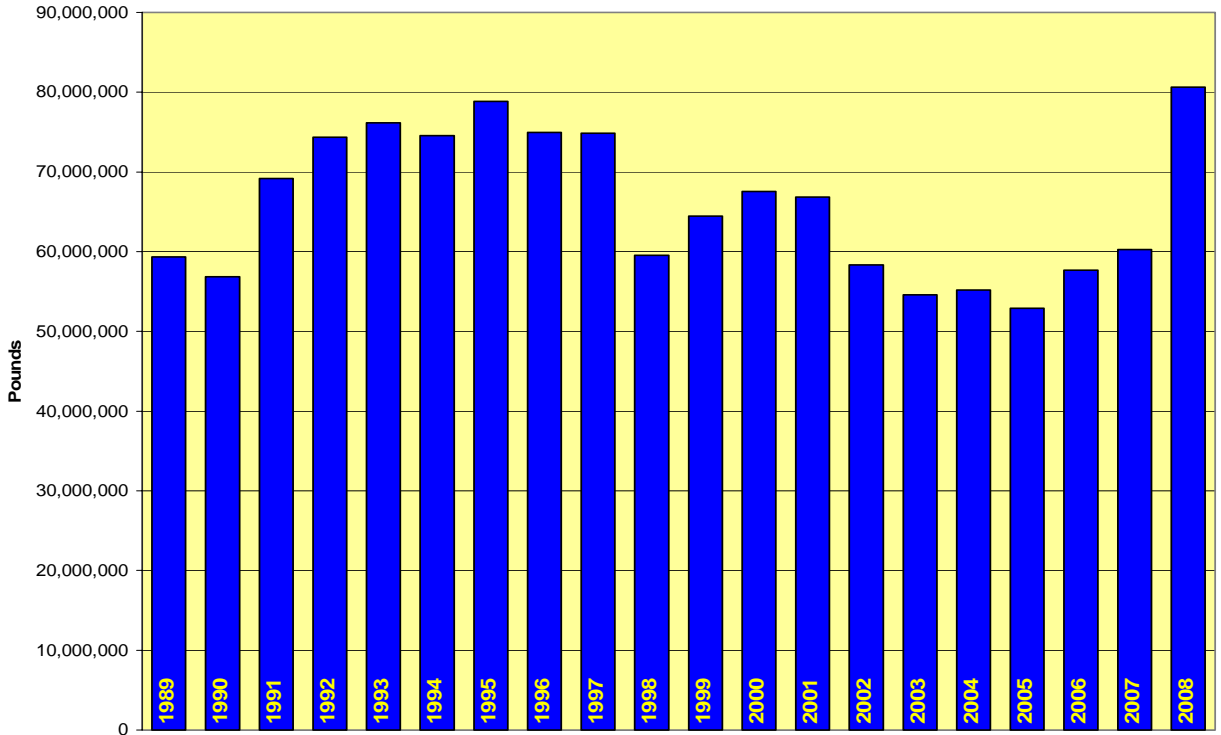
U.S. AVERAGE YIELD PER ACRE 1989 – 2008 (20 YEARS)

Source: USDA-NASS. Prepared by HGA.



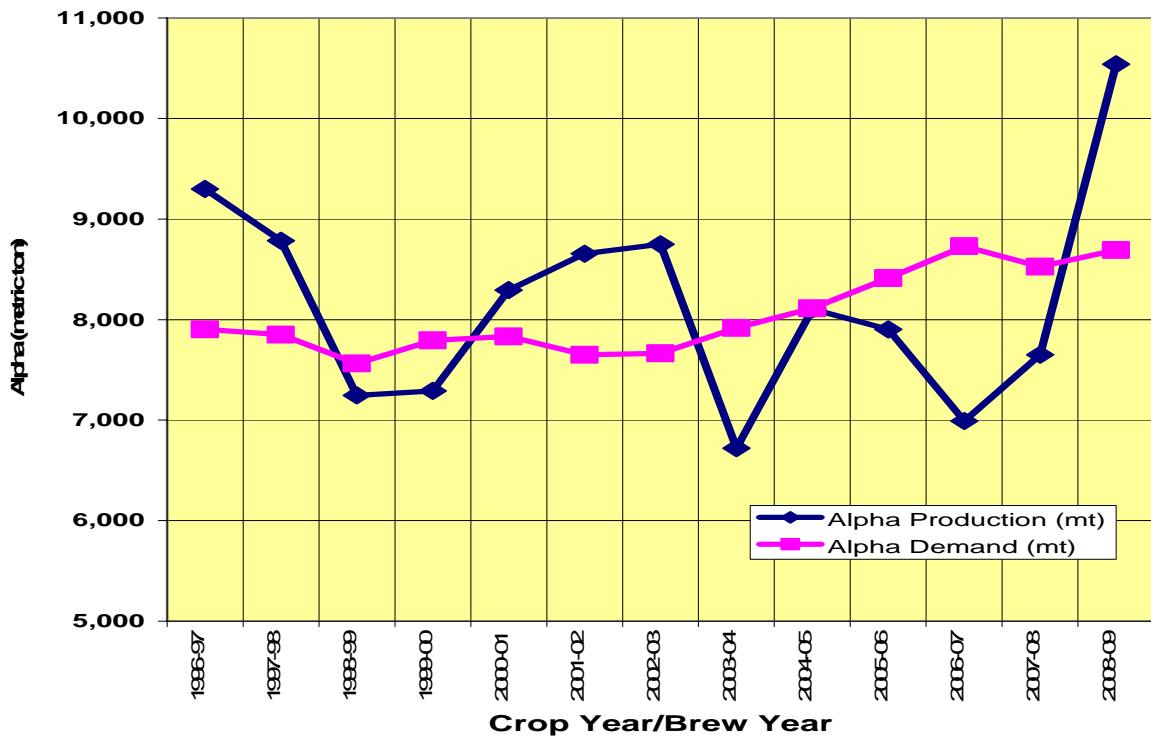
U.S. TOTAL PRODUCTION 1989 – 2008 (20 YEARS)

Source: USDA-NASS. Prepared by HGA.

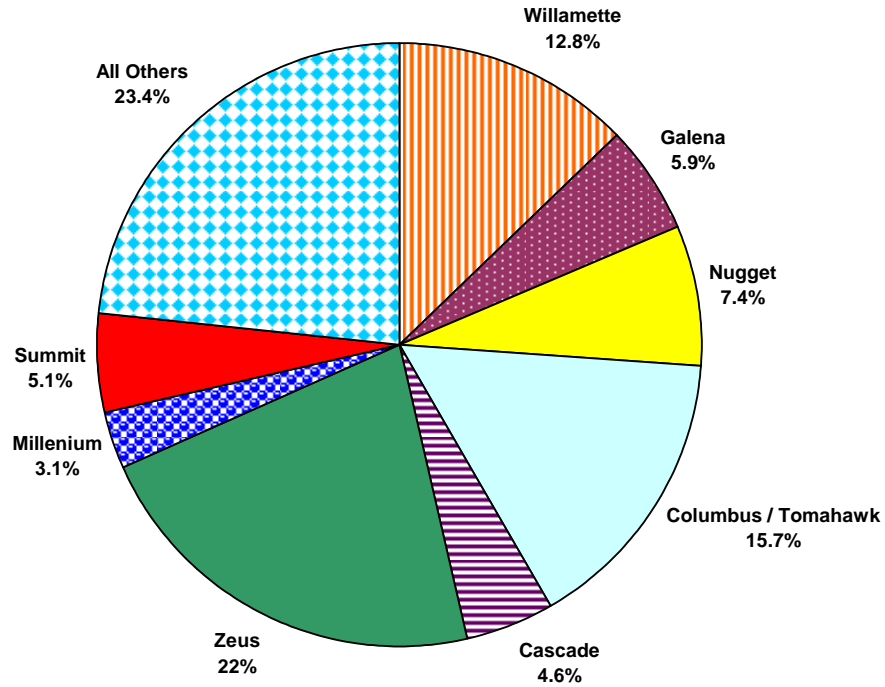


WORLD ALPHA PRODUCTION & DEMAND 1996 – 2009 (13 YEARS)

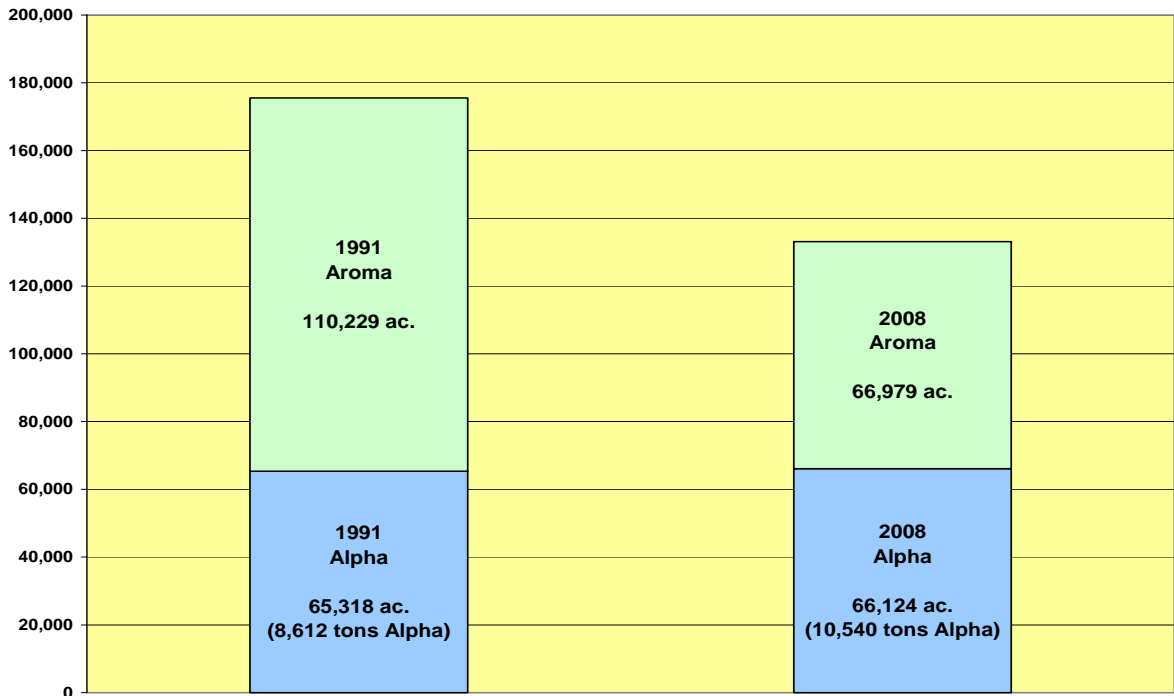
Source: 2007-08 Barth Report.



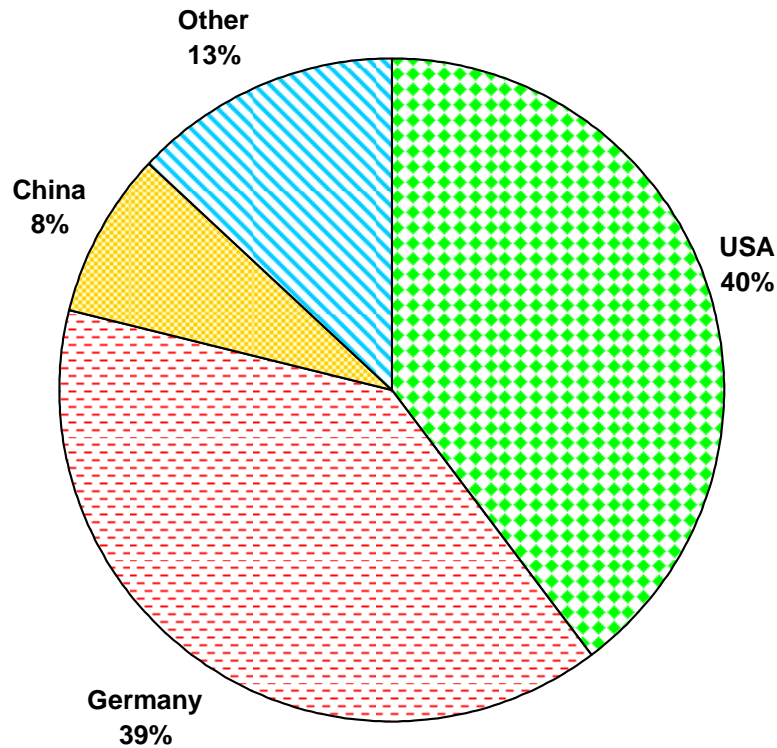
**MOST WIDELY-PLANTED 2008 VARIETIES PRODUCED IN THE U.S.
AND THE % OF THE TOTAL U.S. PRODUCTION THEY REPRESENT**



**COMPOSITION OF WORLD HOP ACREAGE
1991 VERSUS 2008**



WORLD'S LARGEST ALPHA PRODUCERS - 2008



U.S. & GERMAN ALPHA ACID PRODUCTION 1998-2008

YEAR	UNITED STATES		GERMANY	
	Pounds** (x 1,000)	Avg. Alpha*	Pounds (x 1,000)	Avg. Alpha
1998	6,420	10.8	4,630	6.8
1999	6,680	10.4	4,554	7.5
2000	7,238	10.7	5,557	8.9
2001	7,600	11.4	5,688	8.3
2002	6,922	10.9	6,505	9.3
2003	6,393	11.7	4,023	7.2
2004	6,393	11.5	6,426	8.7
2005	5,732	11.0	7,213	9.5
2006	6,597	11.2	6,285	7.7
2007	6,373	10.6	7,063	8.6
2008	9,149	11.3*	9,039	10.3*

SOURCE: Hop Merchant reports and IHGC November 2008 Economic Commission report. Prepared by HGA.

* Estimate for 2008 crop

WORLD HOP ACREAGE & PERCENT SHARE (acres)

COUNTRY	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Germany	45,177 32%	45,915 32%	46,965 33%	45,318 33%	40,879 32%	43,168 36%	42,404 34%	41,247 36%	41,376 34%	43,269 33%
England	5,636 4%	4,828 3%	5,035 3%	4,681 3%	3,538 3%	3,354 2.70%	2,932 2%	2,609 2%	2,619 2%	2,718 2%
Czech Rep.	15,842 11%	16,703 12%	15,864 11%	14,735 11%	14,417 11%	14,420 12%	14,010 11%	13,109 12%	12,832 11%	12,664 10%
Europe (rest)	24,844 17%	25,682 18%	24,679 17%	23,616 17%	22,217 18%	20,666 17.20%	20,236 16%	19,253 17%	17,313 14%	17,236 13%
USA	34,260 24%	36,404 25%	35,891 25%	29,309 22%	28,669 23%	28,020 23.30%	29,188 24%	29,435 26%	30,911 25%	39,263 29%
China	10,556 7%	10,829 7%	11,884 8%	13,930 10%	13,931 11%	11,697 9.70%	11,846 10%	4,910 4%	13,912 11%	14,322 11%
World (rest)	6,530 5%	3,255 2%	4,139 3%	4,364 3%	3,211 3%	3,607 3%	3,354 3%	2,853 3%	3,047 2%	3,633 3%
World Totals	142,845	143,616	144,457	135,944	126,862	119,943	123,609	113,417	122,010	133,105

SOURCE: IHGC Economic Commission November 2008 report. Prepared by HGA

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

COUNTRY	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Germany	60,462 29%	62,709 30%	68,343 32%	69,444 34%	55,115 30%	73,854 36.30%	75,397 37%	62,831 35%	70,854 35%	87,104 36%
England	6,945 3%	6,082 3%	6,019 3%	5,849 3%	4,202 2%	3,525 1.70%	3,732 2%	3,109 2%	3,108 2%	2,976 1%
Czech	14,771 7%	10,815 5.10%	14,669 7%	13,668 7%	11,219 6%	13,889 6.80%	15,238 8%	11,530 6%	12,414 6%	14,771 6%
Europe (rest)	25,904 13%	23,174 11%	22,704 11%	18,178 9%	20,388 11%	23,745 11.60%	24,960 12%	21,312 12%	20,891 10%	23,115 9%
USA	64,455 31%	67,576 32%	66,832 31%	58,336 28%	54,565 30%	55,200 27%	51,796 26%	53,815 30%	58,989 29%	76,235 31%
China	26,455 13%	33,152 15%	29,786 14%	31,224 15%	30,662 17%	25,882 12.70%	23,315 12%	20,944 12%	29,762 15%	35,494 14%
World (rest)	7,685 4%	7,937 4%	8,114 4%	9,332 5%	8,013 4%	7,095 3.50%	6,682 3%	5,227 3%	5,489 3%	5,324 2%
World Totals	206,677	211,445	215,639	206,031	184,164	203,259	201,122	178,768	201,507	245,019

SOURCE: IHGC Economic Commission November 2008 report. Prepared by HGA

MARCH 1 & SEPTEMBER 1 U.S. HOP STOCKS 1993 – 2008

Year	MARCH 1			SEPTEMBER 1		
	Brewer	Dealer / Grower	TOTAL	Brewer	Dealer / Grower	TOTAL
1993	55,800	27,200	83,000	45,520	12,540	58,060
1994	58,200	32,600	90,800	47,070	15,930	63,000
1995	57,900	31,400	89,300	42,800	13,100	55,900
1996	55,900	25,500	81,400	47,000	11,700	58,700
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

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 - 2003-04 through 2007-08

(In pounds; Extract converted at 4:1 ratio)

Country	2003-04	2004-05	2005-06	2006-07	2007-08
GERMANY	14,789,473	31,644,234	31,545,467	29,588,646	29,851,437
UNITED KINGDOM	1,233,705	1,306,899	1,859,817	2,061,761	3,432,152
AUSTRALIA	3,264,601	2,028,250	1,436,530	1,800,734	2,313,087
SLOVENIA	48,502	65,257	136,686	426,814	700,187
ARGENTINA	0	0	0	363,321	583,783
FRANCE	7,337,857	379,195	24,692	24,692	560,855
CZECH REPUBLIC	320,993	643,749	517,645	276,018	477,962
NEW ZEALAND	197,534	761,035	268,964	498,244	429,460
VENEZUELA	0	0	0	0	95,240
ITALY	0	0	0	0	38,801
ETHIOPIA	0	0	0	13,228	34,392
POLAND	3,527	46,738	46,738	100,531	27,337
CHINA, PEOPLES REPUBLIC	0	8,818	0	149,032	26,455
HONG KONG	0	0	0	0	8,818
VIETNAM	0	0	0	0	2,646
SPAIN	0	0	0	0	1,764
SERBIA AND MONTENEGRO	0	3,527	0	0	0
BELGIUM-LUXEMBOURG	401,241	37,919	44,974	7,055	0
AUSTRIA	882	0	7,937	2,646	0
CANADA	1,764	0	0	0	0
Grand Total	27,600,079	36,925,621	35,889,450	35,312,721	38,584,377

SOURCE: U.S.D.A. Foreign Agricultural Service. Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS, TOP 40 COUNTRIES - 2003-04 through 2007-08
(In pounds; Extract converted at 4:1 ratio)

Country	2003-04	2004-05	2005-06	2006-07	2007-08
GERMANY	9,017,778	3,747,413	3,282,679	6,689,919	6,561,390
UNITED KINGDOM	4,140,276	2,955,734	3,599,263	3,621,970	5,784,041
CANADA	5,858,557	5,479,803	2,926,854	2,538,399	5,083,633
BELGIUM-LUXEMBOURG	8,607,057	7,945,671	6,162,574	5,472,528	4,790,639
CHINA, PEOPLES REPUBLIC	1,503,992	2,921,783	3,800,103	3,629,686	4,471,851
MEXICO	8,649,165	7,223,437	5,046,816	2,985,937	4,295,041
BRAZIL	3,367,337	4,277,845	5,564,240	4,159,457	3,563,548
POLAND	253,972	13,228	115,522	204,368	3,211,911
COLOMBIA	2,186,983	1,283,530	923,515	2,063,083	2,066,611
HONG KONG	1,653,024	1,136,041	300,049	951,955	1,815,064
JAPAN	832,905	1,162,496	1,436,751	1,628,773	1,772,294
RUSSIAN FEDERATION	1,094,594	866,857	269,184	761,476	1,586,665
PERU	495,599	1,462,104	906,319	784,404	1,504,653
ARGENTINA	842,826	859,581	866,636	1,466,954	1,387,808
KOREA, REPUBLIC OF	1,348,346	2,578,303	1,332,913	661,827	1,349,668
VENEZUELA	2,095,271	1,763,476	2,326,756	2,432,137	1,255,531
THAILAND	2,223,580	1,954,616	1,203,502	859,581	1,154,339
SOUTH AFRICA, REPUBLIC	109,349	21,164	0	2,646	684,314
DOMINICAN REPUBLIC	1,348,566	2,050,738	1,116,199	726,643	662,488
ECUADOR	236,335	307,765	281,530	369,935	659,181
PHILIPPINES	824,969	957,246	620,601	649,922	657,859
CHILE	885,596	632,285	599,877	660,945	651,686
AUSTRALIA	1,431,680	1,152,134	1,164,260	951,955	609,577
VIETNAM	302,694	479,946	113,097	422,405	570,776
NIGERIA	1,332,472	897,721	244,272	1,060,863	561,737
INDIA	137,568	26,676	66,359	399,477	546,525
NETHERLANDS	1,789,711	1,150,591	1,349,227	1,006,189	510,590
IRELAND	316,583	362,660	284,176	470,466	488,985
EL SALVADOR	28,881	52,911	61,509	106,704	326,284
HONDURAS	60,848	74,957	146,387	274,255	312,174
KENYA	0	4,409	0	263,232	290,128
SINGAPORE	244,272	147,269	125,002	246,036	289,246
GHANA	0	86,421	186,952	201,061	268,964
MALAYSIA	217,816	192,243	289,246	173,063	265,436
SPAIN	24,692	39,683	40,565	300,710	226,635
GUATEMALA	111,554	181,220	152,119	198,416	205,912
INDONESIA	12,346	85,980	108,467	89,067	205,691
PANAMA	73,634	132,277	194,447	126,104	201,502
ITALY	56,659	87,744	47,620	30,424	160,276
ALL OTHER COUNTRIES	2,780,246	2,590,249	1,965,860	2,505,992	1,908,980
Grand Total	66,497,733	59,346,386	49,221,448	52,148,963	62,919,634

SOURCE: U.S. D.A. Foreign Agricultural Service. Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS BY PRODUCT - 2008 (In pounds; fresh hop equivalent)

Country	PELLETS	FRESH/DRIED	GROUND	EXTRACT	TOTAL
GERMANY	2,268,113	89,508	0	4,203,769	6,561,390
UNITED KINGDOM	1,968,726	417,555	0	3,397,760	5,784,041
CANADA	3,832,511	65,698	203,046	982,379	5,083,633
BELGIUM- LUXEMBOURG	1,324,536	48,943		3,417,161	4,790,639
CHINA, PEOPLES REPUBLIC	1,511,047	1,323	10,582	2,948,900	4,471,851
MEXICO	100,090		70,548	4,124,403	4,295,041
BRAZIL	1,532,652	0	246,036	1,784,860	3,563,548
POLAND	715,399			2,496,512	3,211,911
COLOMBIA	955,703	42,108	0	1,068,800	2,066,611
HONG KONG	15,212			1,799,852	1,815,064
JAPAN	755,964	723,556	0	292,774	1,772,294
RUSSIAN FEDERATION	563,721	0		1,022,944	1,586,665
PERU	401,461			1,103,192	1,504,653
ARGENTINA	565,044	0	0	822,764	1,387,808
KOREA, REPUBLIC OF	666,236			683,432	1,349,668
VENEZUELA	0		94,137	1,161,394	1,255,531
THAILAND	87,523	661		1,066,154	1,154,339
SOUTH AFRICA, REPUBLIC	89,948			594,366	684,314
DOMINICAN REPUBLIC	11,023	7,937	3,307	640,222	662,488
ECUADOR	357,589			301,592	659,181
PHILIPPINES	389,336	41,888		226,635	657,859
CHILE	57,100		220	594,366	651,686
AUSTRALIA	118,829	70,989	4,409	415,350	609,577
VIETNAM	5,512			565,265	570,776
NIGERIA				561,737	561,737
INDIA	245,815	0	0	300,710	546,525
NETHERLANDS	0		0	510,590	510,590
IRELAND	1,764	0	52,470	434,751	488,985
EL SALVADOR	4,409		0	321,875	326,284
HONDURAS				312,174	312,174
KENYA	127,868			162,260	290,128
SINGAPORE	0	441	13,669	275,137	289,246
GHANA		13,228		255,736	268,964
MALAYSIA	20,283		0	245,154	265,436
SPAIN	15,873	0		210,762	226,635
GUATEMALA	5,732			200,179	205,912
INDONESIA	48,722			156,969	205,691
PANAMA	41,888	0	0	159,614	201,502
ITALY	8,818	0	50,927	100,531	160,276
CAMEROON				155,205	155,205
ALL OTHER COUNTRIES	498,465	29,321	4,630	1,221,359	1,753,775
Grand Total	19,312,912	1,553,155	753,980	41,299,587	62,919,634

SOURCE: U.S. D.A. Foreign Agricultural Service. Prepared by Bryant Christie Inc.

WORLD BEER PRODUCTION 2005-2008 (MILLION HL)

	2005	2006	2007	2008
Russia	89.2	99.8	116.0	119.0
Germany	105.3	106.8	103.9	101.0
Great Britain	56.0	54.1	50.5	51.0
Spain	31.0	33.6	33.2	32.9
Poland	29.0	33.0	32.5	32.5
Ukraine	24.0	27.2	31.5	37.0
Netherlands	24.6	26.5	28.0	27.5
Czech Republic	19.1	19.8	19.8	19.9
Belgium	17.2	18.3	18.6	18.5
Romania	15.4	17.0	19.5	20.0
France	18.5	17.0	15.1	15.1
Italy	12.3	12.8	13.5	13.6
Ireland	8.9	9.2	9.3	9.3
Turkey	8.9	9.1	9.2	9.2
Austria	8.9	8.9	9.0	9.0
Denmark	8.7	8.9	9.2	9.2
Other Europe	67.4	70.3	69.8	70.8
Total Europe	544.4	572.3	588.6	595.5
USA	230.8	231.6	233.4	236.0
Brazil	88.0	94.0	96.0	97.0
Mexico	70.0	78.1	81.0	81.5
Venezuela	22.0	23.0	26.3	26.5
Canada	23.2	23.6	23.9	24.0
Colombia	14.0	15.0	19.0	19.5
Argentina	13.5	13.9	14.5	15.0
Other Americas	35.7	38.8	38.9	40.8
Total Americas	497.2	518.0	533.0	540.3
China	315.0	352.0	393.0	395.0
Japan	65.1	63.0	62.7	60.2
Thailand	22.5	23.0	22.0	22.5
South Korea	18.2	18.0	18.0	18.2
Vietnam	14.0	17.0	18.4	18.8
Philippines	13.0	13.5	13.7	13.6
Other Asia	27.1	27.1	30.1	31.2
Total Asia	474.9	513.6	557.9	559.5
South Africa	26.0	26.5	26.5	27.0
Nigeria	9.5	11.0	12.3	13.0
Other Africa	37.3	41.1	39.6	41.5
Total Africa	72.8	78.6	78.4	81.5
Australia	17.0	17.2	16.9	17.0
New Zealand	3.1	3.1	3.4	3.7
Oceania	1.2	1.0	1.2	1.2
Total Australia	21.3	21.3	21.5	21.9
WORLD TOTALS	1,610.6	1,703.7	1,779.4	1,798.7

Source: Hopsteiner – Guidelines for Hop Buying 2008. Prepared by HGA.