



USA Hops

2007

STATISTICAL REPORT

FINAL REPORT

RELEASED JUNE 2008

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 2003 – 2007

STATE & VARIETY	ACRES HARVESTED					2006-07
	2003	2004	2005	2006	2007	% +/-
IDAHO						
Total Idaho	3,429	3,253	3,287	2,797	2,896	3.54%
OREGON						
Cascade	*	91	62	*	*	
Glacier	245	243	231	*	*	
Golding	95	105	105	117	115	-1.71%
Millennium	*	264	295	258	294	13.95%
Mt. Hood	217	215	219	113	178	57.52%
Nugget	1,529	1,286	1,363	1,500	1,675	11.67%
Perle	450	259	*	*	*	
Sterling	84	222	276	109	95	-12.84%
Willamette	2,224	2,175	2,273	2,301	2,396	4.13%
Other	904	247	339	638	517	-18.97%
Total Oregon	5,748	5,107	5,163	5,036	5,270	4.65%
WASHINGTON						
Ahtanum	*	*	131	40	42	5.00%
Cascade	2,120	1,422	1,168	1,116	1,303	16.76%
Centennial	*	*	112	*	*	
Chelan	180	201	212	505	505	0.00%
Chinook	453	492	489	365	311	-14.79%
Cluster	430	449	463	352	366	3.98%
Columbus/Tomahawk®	2,738	3,029	2,812	2,772	3,342	20.56%
Galena	2,856	3,417	3,869	3,809	3,030	-20.45%
Glacier	*	*	48	17	21	23.53%
Golding	22	36	37	53	52	-1.89%
Hallertauer	53	46	48	49	56	14.29%
Millennium	1,386	1,124	1,115	910	728	-20.00%
Mt. Hood	32	39	51	44	43	-2.27%
Northern Brewer	65	65	*	*	*	
Nugget	918	807	1,062	1,100	1,093	-0.64%
Perle	104	47	*	*	*	
Sterling	*	*	93	62	*	
Summit®	*	*	*	66	632	857.58%
Vanguard	*	*	*	*	64	
Willamette	3645	3,542	4,102	4,554	4,462	-2.02%
YCR4 - Palisade®	*	*	54	54	91	68.52%
YCR5 - Warrior®	1,242	793	584	421	339	-19.48%
Zeus	2,333	2,903	3,736	3,982	4,737	18.96%
Other	915	970	908	1,261	1,528	21.17%
Total Washington	19,492	19,382	21,013	21,532	22,745	5.63%
Total United States	28,669	27,742	29,463	29,365	30,911	5.26%

SOURCE: USDA-NASS. Prepared by HGA.

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

U.S. HOP YIELDS BY STATE AND VARIETY 2003 – 2007

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2006-07
	2003	2004	2005	2006	2007	% +/-
IDAHO						
Total Idaho	1,536	1,588	1,640	1,613	1,417	-12.15%
OREGON						
Cascade	*	1,393	1,365	*	*	
Glacier	677	1,521	1,330	*	*	
Golding	996	1,309	1,017	1,371	1,403	2.33%
Millennium	*	2,030	1,876	2,540	2,323	-8.54%
Mt. Hood	1,569	1,620	1,414	1,544	1,640	6.22%
Nugget	2,169	2,229	2,046	2,164	2,231	3.10%
Perle	1,026	1,327	*	*	*	
Sterling	2,005	1,209	1,451	1,766	1,665	-5.72%
Willamette	1,369	1,507	1,385	1,459	1,577	8.09%
Other	1,942	1,370	1,048	1,508	1,416	-6.10%
Total Oregon	1,626	1,686	1,560	1,757	1,811	3.07%
WASHINGTON						
Ahtanum	*	*	1,986	2,110	1,964	-6.92%
Cascade	1,808	2,006	2,036	1,954	2,031	3.94%
Centennial	*	*	1,375	*	*	
Chelan	2,545	2,482	2,244	2,187	2,364	8.09%
Chinook	1,903	1,900	1,844	1,871	1,818	-2.83%
Cluster	2,003	2,034	1,782	2,184	2,030	-7.05%
Columbus/Tomahawk®	2,745	2,557	2,516	2,660	2,533	-4.77%
Galena	1,914	1,860	1,737	1,820	1,776	-2.42%
Glacier	*	*	1,063	1,441	1,619	12.35%
Golding	1,118	989	886	992	1,500	51.21%
Hallertauer	885	1,057	967	812	763	-6.03%
Millennium	2,267	2,339	1,908	2,324	2,350	1.12%
Mt. Hood	1,475	1,387	1,267	1,109	1,316	18.67%
Northern Brewer	1,755	2,191	*	*	*	
Nugget	1,882	2,073	1,727	1,841	1,909	3.69%
Perle	919	1,245	*	*	*	
Sterling	*	*	1,527	1,419	*	
Summit®	*	*	*	1,864	1,822	-2.25%
Vanguard	*	*	*	*	1,470	
Willamette	1,332	1,411	1,333	1,222	1,318	7.86%
YCR4 - Palisade®	*	*	2,759	2,998	2,519	-15.98%
YCR5 - Warrior®	2,126	2,300	1,830	2,159	1,903	-11.86%
Zeus	2,904	3,125	2,255	2,962	2,839	-4.15%
Other	1,436	1,641	1,576	1,775	1,355	-23.66%
Total Washington	2,050	2,137	1,878	2,058	2,049	-0.44%
Total United States	1,903	1,990	1,796	1,964	1,949	-0.76%

SOURCE: USDA-NASS. Prepared by HGA.

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

U.S. HOP PRODUCTION BY STATE AND VARIETY 2003 – 2007

STATE & VARIETY	HOP PRODUCTION (POUNDS)					2006-07
	2003	2004	2005	2006	2007	% +/-
IDAHO						
Total Idaho	5,266,300	5,165,000	5,390,900	4,510,400	4,104,900	-8.99%
OREGON						
Cascade	*	126,800	84,600	*	*	
Glacier	165,800	369,600	307,200	*	*	
Golding	94,600	137,400	106,800	160,400	161,400	0.62%
Millennium	*	536,000	553,400	744,200	682,900	-8.24%
Mt. Hood	340,400	348,400	309,600	248,600	292,000	17.46%
Nugget	3,316,400	2,866,000	2,788,800	3,440,800	3,737,500	8.62%
Perle	461,800	343,800	*	*	*	
Sterling	168,400	268,400	400,400	217,200	158,200	-27.16%
Willamette	3,045,000	3,277,200	3,147,800	3,357,200	3,778,800	12.56%
Other	1,755,200	338,400	355,400	680,100	732,000	7.63%
Total Oregon	9,347,600	8,612,000	8,054,000	8,848,500	9,542,800	7.85%
WASHINGTON						
Ahtanum	*	*	99,300	84,400	82,500	-2.25%
Cascade	3,833,000	2,852,500	2,378,000	2,180,700	2,646,400	21.36%
Centennial	*	*	154,000	*	*	
Chelan	458,100	498,000	475,700	1,104,400	1,193,800	8.09%
Chinook	862,100	934,800	901,700	682,900	565,400	-17.21%
Cluster	861,300	913,300	825,100	768,800	743,000	-3.36%
Columbus/Tomahawk®	7,515,800	7,745,200	7,075,000	7,373,500	8,465,300	14.81%
Galena	5,466,400	6,355,600	6,720,500	6,932,400	5,381,300	-22.37%
Glacier	*	*	51,000	24,500	34,000	38.78%
Golding	24,600	35,600	32,800	52,600	78,000	48.29%
Hallertauer	46,900	48,600	46,400	39,800	42,700	7.29%
Millennium	3,142,100	2,629,000	2,127,400	2,114,800	1,710,800	-19.10%
Mt. Hood	47,200	54,100	64,800	48,800	56,600	15.98%
Northern Brewer	114,100	142,100	*	*	*	
Nugget	1,727,700	1,672,900	1,834,100	2,025,100	2,086,500	3.03%
Perle	95,600	58,500	*	*	*	
Sterling	*	*	142,000	88,000	*	
Summit®	*	*	*	123,000	1,151,500	836.18%
Vanguard	*	*	*	*	94,100	
Willamette	4,855,100	4,997,800	5,468,000	5,565,000	5,880,900	5.68%
YCR4 - Palisade®	*	*	149,000	161,900	229,200	41.57%
YCR5 - Warrior®	2,640,500	1,823,900	1,068,700	908,900	645,100	-29.02%
Zeus	6,775,000	9,071,900	8,424,700	11,794,700	13,448,300	14.02%
Other	1,485,700	1,591,900	1,431,400	2,238,700	2,070,000	-7.54%
Total Washington	39,951,200	41,426,900	39,469,600	44,312,900	46,605,400	5.17%
Total United States	54,565,100	55,203,900	52,914,500	57,686,700	60,253,100	4.45%

SOURCE: USDA-NASS. Prepared by HGA.

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

U.S. HOP ACREAGE BY STATE 1997 – 2007 (IN ACRES)

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
1997	31,080	8,352	3,870	43,302
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

SOURCE: USDA-NASS. Prepared by HGA.

U.S. AVERAGE HOP YIELD 1997 – 2007

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL U.S.
1997	1,796	1,625	1,417	1,729
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

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)
1992	\$1.72	\$1.86	\$1.69	\$1.74	74,337	\$129,096
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	57,687	\$118,008
2007	\$2.75	\$3.12	\$2.77	\$2.81	60,253	\$169,310

SOURCE: USDA-NASS. Prepared by HGA.

2007 HOP INSPECTION REPORT

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

YEAR	WASHINGTON (%)	OREGON (%)	IDAHO (%)	TOTAL (%)
2003	194,751 (0.07)	46,738 (0.12)	25,802 (0.02)	267,291 (0.08)
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)

TABLE 2. Number of Bales in Each Leaf & Stem Category – 2007

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	199,432	28,131	3,622	219	572	345	133	176	232,630
OR	38,916	8,684	596						48,196
ID	17,316	2,639		168	400				20,523
Total	255,664	39,454	4,218	387	972	345	133	176	301,349
% of Total	85%	13%	1%	0%	0%	0%	0%	0%	100%

TABLE 3. Number of Bales in Each Seed Category – 2007

	0%	1%	2%	3%	4%	5%	6%	7+%	TOTAL
WA	143,051	50,579	19,297	11,399	3,099	3,046	722	1,437	232,630
OR	24,013	8,191	3,421	2,049	1,677	1,485	2,073	5,287	48,196
ID	18,955	1,396	172						20,523
Total	186,019	60,166	22,890	13,448	4,776	4,531	2,795	6,724	301,349
% of Total	62%	20%	8%	4%	2%	2%	1%	2%	100%

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

U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE 1997 – 2007

Year	WASHINGTON	OREGON	IDAHO	U.S. AVERAGE %	
	Leaf & Stem	Leaf & Stem	Leaf & Stem	Leaf & Stem	Seed Content
1997	0.52	0.64	0.66	0.55	1.15
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

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

IHGC AROMA ACREAGE 2003 – 2007

COUNTRY	AROMA ACREAGE (IN ACRES)					2007
	2003	2004	2005	2006	2007	% +/-
Australia*	7	7	16	15	22	46.67%
Belgium	84	86	121	86	106	23.26%
Bulgaria	178	178	178	178	178	0.00%
China*	464	464	1,331	1,352	1,359	0.52%
Czech Rep.	13,980	13,227	13,323	12,899	12,664	-1.82%
France	1,857	1,717	1,781	1,772	1,814	2.37%
Germany	22,269	23,122	24,166	24,622	24,998	1.53%
New Zealand*	580	635	625	554	539	-2.71%
Poland	2,222	2,193	2,109	2,073	1,942	-6.32%
Portugal*	0	0	0	0	0	0.00%
Russia	869	748	692	482	395	-18.05%
Serbia	321	116	116	84	84	0.00%
Slovakia	864	865	865	865	865	0.00%
Slovenia	3,699	3,623	3,433	3,459	3,415	-1.27%
South Africa*	0	0	0	0	0	0.00%
Spain	0	0	0	0	0	0.00%
Ukraine	2,560	1,882	2,211	2,212	1,527	-30.97%
UK - England	2,094	2,043	2,179	1,937	1,977	2.07%
USA	12,491	11,411	10,648	10,853	10,977	1.14%
IHGC Total	65,035	62,318	61,997	63,442	62,862	-0.91%

*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 2003 – 2007

COUNTRY	ALPHA ACREAGE (IN ACRES)					2007
	2003	2004	2005	2006	2007	% +/-
Australia*	1,077	1,317	1,094	904	1,068	18.14%
Belgium	449	393	326	361	329	-8.86%
Bulgaria	368	368	368	368	368	0.00%
China*	13,467	11,234	9,537	3,558	12,553	252.81%
Czech Rep.	437	506	576	210	168	-20.00%
France	86	91	100	96	86	-10.42%
Germany	18,610	18,276	17,243	16,625	16,378	-1.49%
New Zealand*	472	408	371	319	336	5.33%
Poland	3,284	3,285	3,421	3,447	3,442	-0.15%
Portugal*	91	91	91	91	91	0.00%
Russia	612	524	652	556	168	-69.78%
Serbia	602	491	291	82	82	0.00%

Slovakia	0	0	0	0	0	0.00%
Slovenia	259	227	178	148	183	23.65%
South Africa*	1,242	1,242	1,250	1,082	1,082	0.00%
Spain	1,802	1,680	1,680	1,483	1,216	-18.00%
Ukraine	1,494	1,218	1,405	1,406	1,021	-27.38%
UK - England*	1,444	1,237	753	603	642	6.47%
USA	16,007	16,608	18,540	18,582	19,934	7.28%
IHGC Total	61,827	56,229	57,776	49,923	59,147	18.48%

*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 2003 – 2007

COUNTRY	TOTAL ACREAGE (IN ACRES)					2007
	2003	2004	2005	2006	2007	% +/-
Australia *	1,084	1,323	1,109	899	1,090	21.25%
Belgium	533	487	447	447	435	-2.68%
Bulgaria	546	546	546	546	546	0.00%
China *	13,931	11,697	11,486	4,910	13,912	183.34%
Czech Rep.	14,417	14,420	14,010	13,109	12,832	-2.11%
France	1,943	1,944	1,978	1,871	1,900	1.55%
Germany	40,879	43,168	42,402	41,247	41,376	0.31%
New Zealand *	1,052	1,042	995	872	875	0.34%
Poland	5,506	5,478	5,530	5,520	5,385	-2.45%
Portugal *	91	91	91	91	91	0.00%
Russia	1,481	1,370	1,344	1,038	563	-45.76%
Serbia	923	607	408	166	166	0.00%
Slovakia	864	865	865	865	865	0.00%
Slovenia	3,958	3,982	3,732	3,608	3,598	-0.28%
South Africa*	1,242	1,242	1,250	1,082	1,082	0.00%
Spain	1,802	1,680	1,680	1,483	1,216	-18.00%
Ukraine	4,054	3,616	3,616	3,618	2,548	-29.57%
UK – England*	3,538	3,354	2,932	2,609	2,619	0.38%
USA	28,499	28,020	29,188	29,435	30,911	5.01%
IHGC Total	126,862	119,943	123,609	113,417	122,010	7.58%

*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.

2007 IHGC HOP ACREAGE AND PRODUCTION

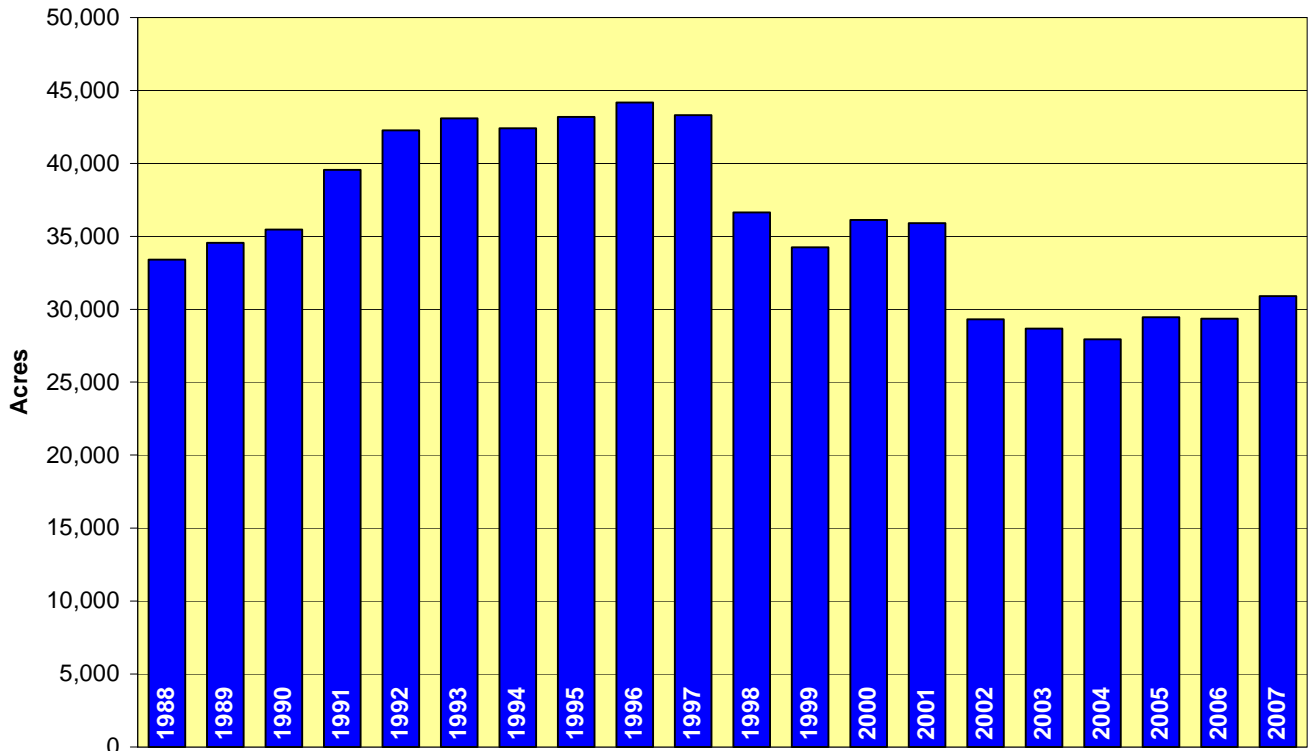
COUNTRY	HOP ACREAGE (acres)				HOP PRODUCTION (pounds)			
	AROMA	ALPHA	TOTAL	NEW	AROMA	ALPHA	TOTAL	Alpha MT.
Australia	22	1,068	1,090	0	24,251	1,937,843	1,962,094	117
Belgium	106	329	435	0	134,481	573,196	707,677	32
Bulgaria	178	368	546	0	176,368	324,076	500,444	18
China	1,359	12,553	13,912	410	3,306,900	26,455,200	29,762,100	717
Czech Rep.	12,664	168	12,832	484	12,092,231	321,872	12,414,103	208
France	1,814	86	1,900	64	3,159,192	101,412	3,260,604	51
Germany	24,998	16,378	41,376	2,357	41,093,744	29,759,895	70,853,639	2,880
New Zealand	539	336	875	0	1,080,254	462,966	1,543,220	64
Poland	1,942	3,442	5,385	0	2,028,232	5,149,946	7,178,178	222
Portugal	0	91	91	0	0	125,662	125,662	6
Russia	395	168	563	0	246,915	101,412	348,327	7
Serbia	84	82	166	0	121,253	123,458	244,711	9
Slovakia	865	0	865	0	540,127	0	540,127	7
Slovenia	3,415	183	3,598	282	4,190,945	189,596	4,380,541	113
South Africa	0	1,082	1,082	0	0	1,984,140	1,984,140	121
Spain	0	1,216	1,216	0	0	2,061,301	2,061,301	116
Ukraine	1,527	1,021	2,548	282	925,932	617,288	1,543,220	38
UK - England	1,977	642	2,619	0	2,160,508	947,978	3,108,486	115
USA**	10,977	19,934	30,911	0	15,778,322	43,210,160	58,988,482	3,280
2007 IHGC Totals	62,862	59,147	122,010	3,879	87,059,655	114,447,401	201,507,056	8,121

** New hop areas expected to have a normal crop, and included in producing acreage totals (USA).

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

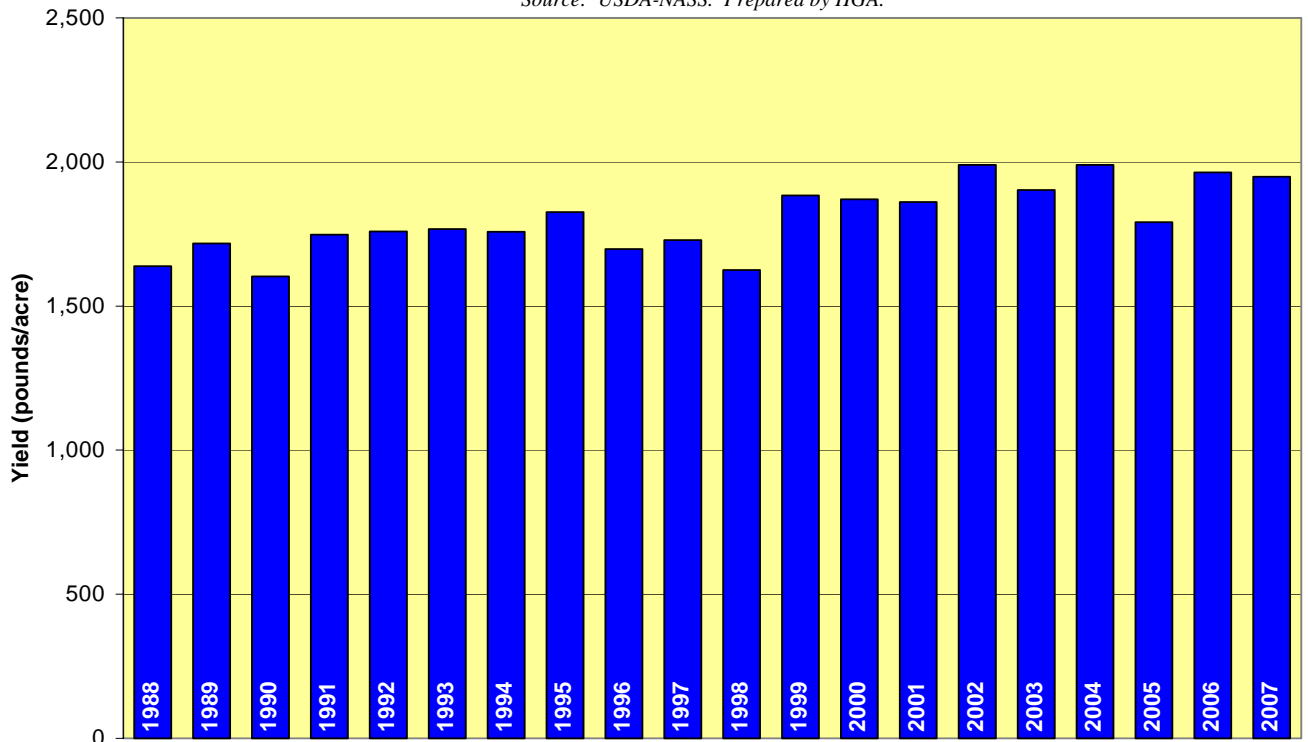
U.S. TOTAL HOP ACREAGE 1988 – 2007 (20 YEARS)

Source: USDA-NASS. Prepared by HGA.



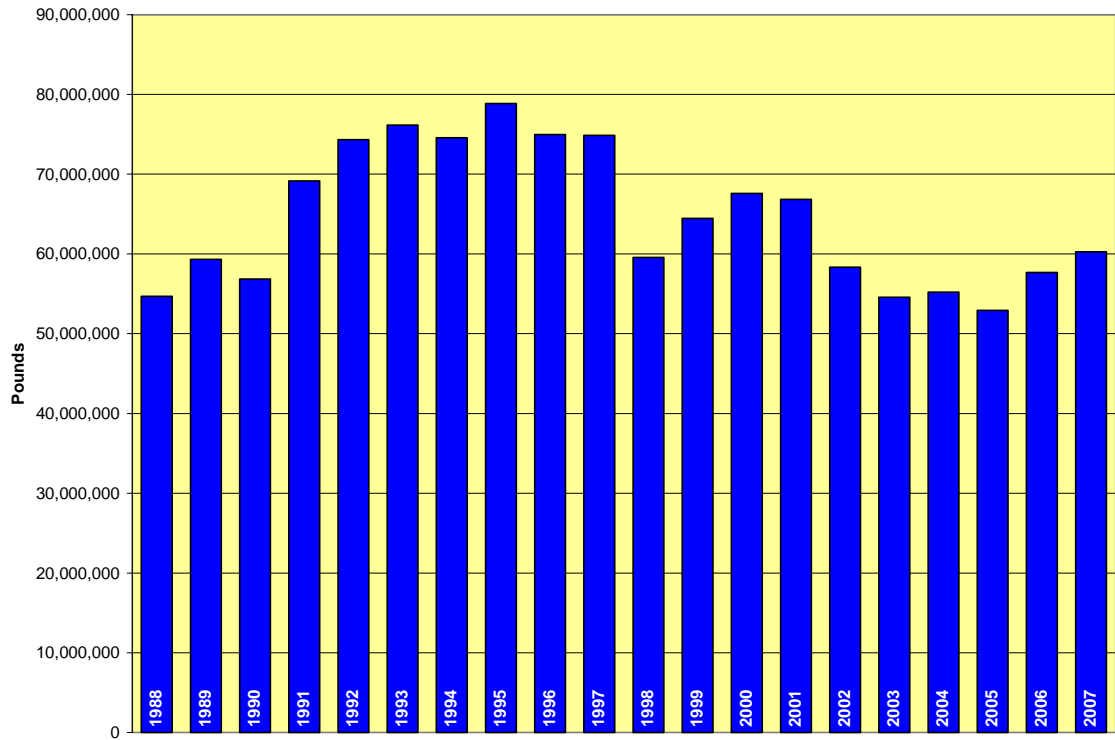
U.S. AVERAGE YIELD PER ACRE 1988 – 2007 (20 YEARS)

Source: USDA-NASS. Prepared by HGA.



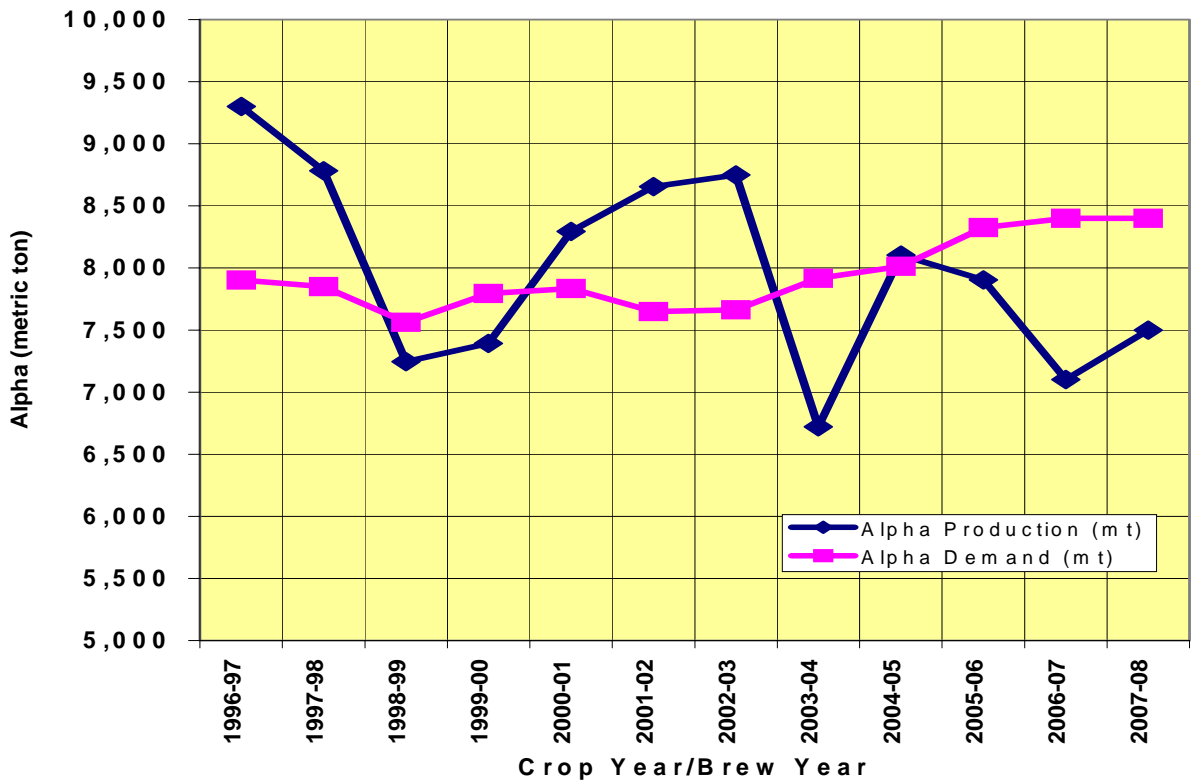
U.S. TOTAL PRODUCTION PER ACRE 1988 – 2007 (20 YEARS)

Source: USDA-NASS. Prepared by HGA.

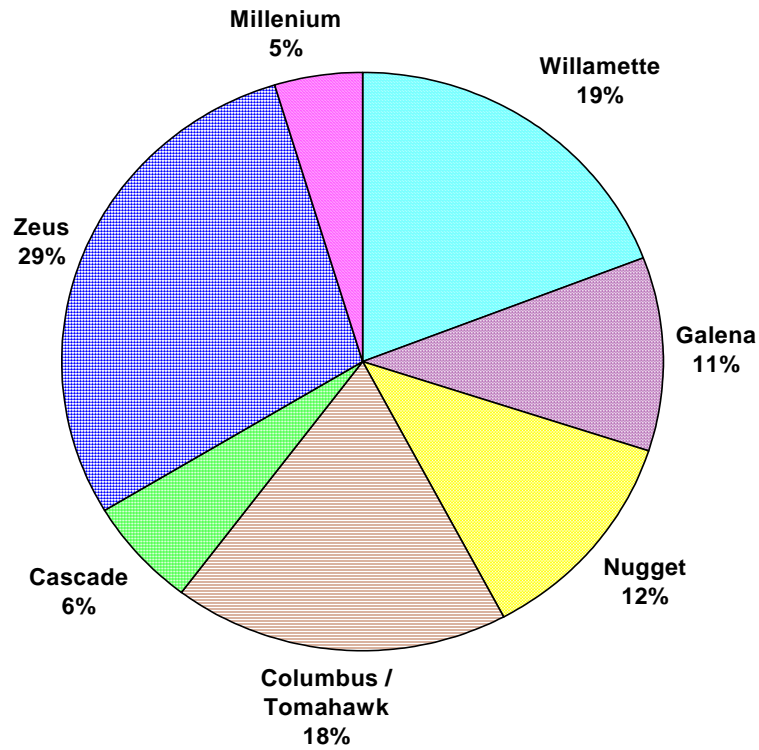


WORLD ALPHA PRODUCTION & DEMAND 1996 – 2007 (12 YEARS)

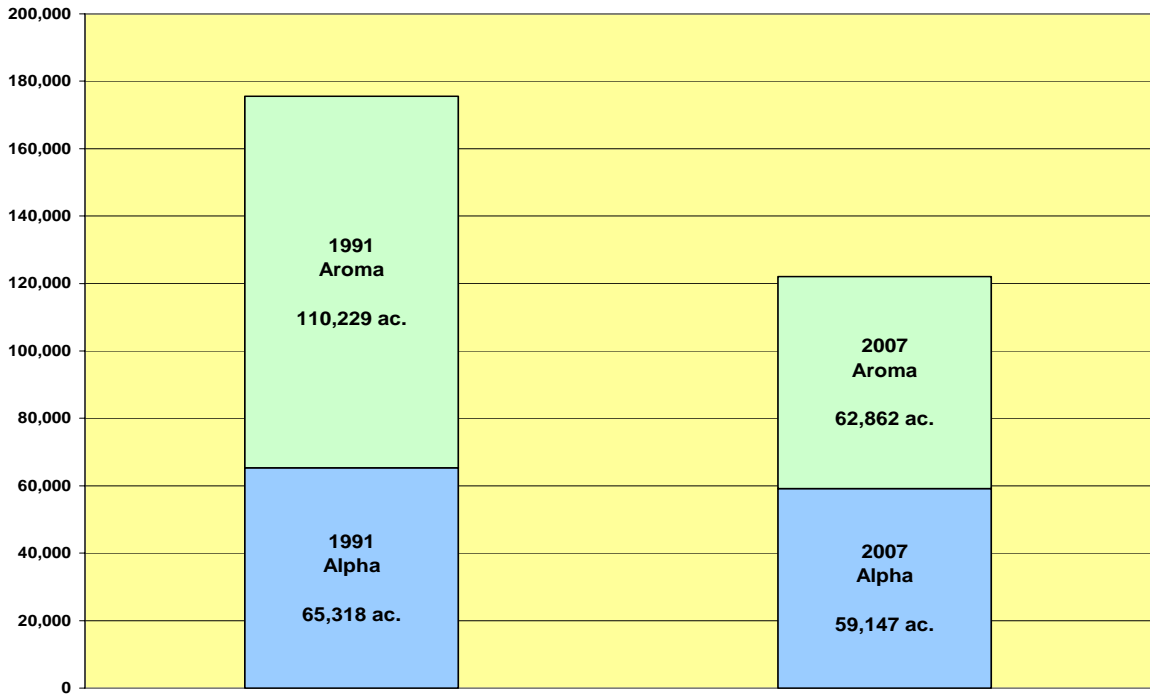
(1997 and 1998 data points are estimated). Source: 2006-07 Barth Report.



**SEVEN MOST WIDELY-PLANTED 2007 VARIETIES PRODUCED IN THE U.S.
AND THE % OF THE TOTAL U.S. PRODUCTION THEY REPRESENT**



**COMPOSITION OF WORLD HOP ACREAGE
1991 VERSUS 2007 (IN ACRES)**



WORLD HOP ACREAGE & PERCENT SHARE (acres)

COUNTRY	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Germany	48,638 33%	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%
England	6,047 4%	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%
Czech	15,091 10%	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%
Europe (rest)	25,840 17%	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%
USA	36,673 25%	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%
China	10,556 7%	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%
World (rest)	6,577 4%	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%
World Totals	149,422	142,845	143,616	144,457	135,944	126,862	119,943	123,609	113,417	122,010

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

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

COUNTRY	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Germany	68,166 33%	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%
England	7,209 3%	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%
Czech	11,751 6%	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%
Europe (rest)	24,857 12%	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%
USA	59,548 29%	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%
China	26,581 13%	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%
World (rest)	8,823 4%	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%
World Totals	206,935	206,677	211,445	215,639	206,031	184,164	203,259	201,122	178,768	201,507

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

MARCH 1 & SEPTEMBER 1 U.S. HOP STOCKS 1992 – 2007

Year	MARCH 1			SEPTEMBER 1		
	Brewer	Dealer / Grower	TOTAL	Brewer	Dealer / Grower	TOTAL
1992	55,470	17,860	73,330	46,270	9,980	56,250
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

SOURCE: USDA NASS. 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 domestic and foreign hops.

U.S. HOP EXPORTS, TOP 20 COUNTRIES - 2002-03 through 2006-07

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

Country	2002-03	2003-04	2004-05	2005-06	2006-07
GERMANY	4,287,104	9,017,778	3,747,413	3,282,679	6,689,919
BELGIUM- LUXEMBOURG	4,951,797	8,607,057	7,945,671	6,162,574	5,472,528
BRAZIL	2,972,930	3,367,337	4,277,845	5,564,240	4,159,457
CHINA, PEOPLES REPUBLIC	664,913	1,503,992	2,921,783	3,800,103	3,629,686
UNITED KINGDOM	3,402,170	4,140,276	2,955,734	3,599,263	3,621,970
MEXICO	7,042,879	8,649,165	7,223,437	5,046,816	2,985,937
CANADA	5,727,162	5,858,557	5,479,803	2,926,854	2,538,399
VENEZUELA	1,260,161	2,095,271	1,763,476	2,326,756	2,432,137
COLOMBIA	1,865,990	2,186,983	1,283,530	923,515	2,063,083
JAPAN	1,089,303	832,905	1,162,496	1,436,751	1,636,710
ARGENTINA	362,880	842,826	859,581	866,636	1,466,954
NIGERIA	775,144	1,332,472	897,721	244,272	1,060,863
NETHERLANDS	1,747,161	1,789,711	1,150,591	1,349,227	1,006,189
AUSTRALIA	726,202	1,431,680	1,152,134	1,164,260	951,955
HONG KONG	1,702,187	1,653,024	1,136,041	300,049	951,955
THAILAND	1,699,762	2,223,580	1,954,616	1,203,502	859,581
PERU	194,888	495,599	1,462,104	906,319	784,404
RUSSIAN FEDERATION	404,989	1,094,594	866,857	269,184	761,476
DOMINICAN REPUBLIC	1,478,418	1,348,566	2,050,738	1,116,199	726,643
KOREA, REPUBLIC OF	2,662,740	1,348,346	2,578,303	1,332,913	661,827
ALL OTHER COUNTRIES	5,597,530	6,678,014	6,476,512	5,399,335	7,699,635
Grand Total	50,616,311	66,497,732	59,346,386	49,221,449	52,161,309

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

U.S. HOP EXPORTS BY PRODUCT - 2007 (In pounds; fresh hop equivalent)

Country	PELLETS	FRESH/DRIED	GROUND	EXTRACT	Grand Total
GERMANY	1,024,928	0	0	5,664,992	6,689,919
BELGIUM- LUXEMBOURG	2,037,951	28,881	0	3,405,697	5,472,528
BRAZIL	1,099,224	8,157	0	3,052,076	4,159,457
CHINA, PEOPLES REPUB	914,697	882	35,053	2,679,054	3,629,686
UNITED KINGDOM	1,444,908	69,446	0	2,107,617	3,621,970
MEXICO	172,401	0	1,323	2,812,213	2,985,937
CANADA	2,029,794	16,535	51,147	440,924	2,538,399
VENEZUELA	3,527	0	0	2,428,609	2,432,137
COLOMBIA	1,116,199	0	661	946,223	2,063,083
JAPAN	809,536	484,355	1,543	341,275	1,636,710
ARGENTINA	237,878	39,463	0	1,189,613	1,466,954
NIGERIA	0	0	0	1,060,863	1,060,863
NETHERLANDS	52,911	0	0	953,278	1,006,189
HONG KONG	172,401	0	0	779,554	951,955
AUSTRALIA(*)	87,523	18,739	0	845,692	951,955
THAILAND	8,598	0	0	850,983	859,581
PERU	76,280	0	0	708,124	784,404
RUSSIAN FEDERATION	411,382	29,101	0	320,993	761,476
DOMINICAN REPUBLIC	3,527	8,818	0	714,297	726,643
KOREA, REPUBLIC OF	114,199	0	0	547,628	661,827
ALL OTHER COUNTRIES	1,252,445	17,196	15,432	6,414,562	7,699,635
GRAND TOTAL	13,070,311	721,572	105,160	38,264,266	52,161,309

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

U.S. IMPORTS OF HOPS. PELLETS & HOP EXTRACT (Pounds x 1,000)
CONES, FRESH/DRIED

Mktg Yr	Australia	Belg	Canada	China	Czech	France	Germany	NZ	Poland	U.K.	Other	Total
1997-98	7.0	0.0	203.0	0.0	170.0	1,283.0	4,652.0	2.0	2.0	112.0	0.0	6,431.0
1998-99	85.0	44.0	0.0	0.0	130.0	1,402.0	6,389.0	2.0	0.0	35.0	2.0	8,089.0
1999-00	2.0	0.0	2.0	0.0	663.0	1,774.0	5,760.0	31.0	0.0	205.0	11.0	8,450.0
2000-01	0.0	26.7	0.0	0.0	69.2	2,313.0	3,409.0	1.9	0.0	97.6	0.0	5,919.0
2001-02	0.0	0.0	0.0	0.0	110.0	1,963.5	4,329.0	4.4	0.0	136.0	0.0	6,810.0
2002-03	0.0	0.0	0.0	0.0	50.0	2,210.0	3,601.2	0.6	0.0	91.0	0.0	6,020.0
2003-04	0.0	0.0	4.0	0.0	121.6	1,392.4	1,127.9	17.0	0.0	17.2	29.7	7,118.0
2004-05	0.0	0.0	0.0	0.0	80.2	5.5	138.9	3.5	5.5	121.7	17.6	395.0
2005-06	0.0	0.0	0.0	0.0	92.6	6.0	99.2	5.0	9.0	87.7	27.0	388.0
2006-07	0.0	0.0	0.0	0.0	37.3	5.0	110.5	8.4	23.1	84.0	21.2	289.2
PELLETS (INCLUDES POWDER)												
Mktg Yr	Australia	Belg	Canada	China	Czech	France	Germany	NZ	Poland	U.K.	Other	Total
1997-98	181.0	0.0	0.0	0.0	99.0	0.0	2,892.0	514.0	0.0	410.0	99.0	4,195.0
1998-99	202.0	0.0	0.0	0.0	44.0	0.0	1,426.0	304.0	0.0	223.0	23.0	2,222.0
1999-00	220.0	0.0	0.0	0.0	2.0	0.0	1,675.0	580.0	20.0	106.0	0.0	2,603.0
2000-01	1,006.0	0.0	0.0	0.0	12.3	0.0	1,296.0	601.0	0.0	163.0	0.0	3,090.0
2001-02	562.0	0.0	0.0	0.0	69.0	0.0	1,402.0	38.0	0.0	240.0	0.0	2,371.0
2002-03	832.0	0.0	0.0	915.0	43.0	0.0	1,923.0	205.0	0.0	253.7	520*	4,827.6
2003-04	816.1	0.0	4.0	0.0	38.5	440.0	2,471.0	46.5	2.0	461.0	5.0	11,507.0
2004-05	483.0	0.0	0.0	0.0	80.6	88.0	7,713.0	187.0	6.0	170.0	0.0	8,732.1
2005-06	338.0	9.7	0.0	0.0	22.5	0.0	7,597.0	62.0	2.0	304.3	9.0	8,378.7
2006-07	450.0	0.0	0.0	9.7	31.7	0.0	7,095.0	116.1	2.0	399.0	276.0	8,283.6
EXTRACT (HOP EQUIVALENT X 4)												
Mktg Yr	Australia	Belg	Canada	China	Czech	France	Germany	NZ	Poland	U.K.	Other	Total
1997-98	0.0	0.0	0.0	0.0	0.0	0.0	335.0	0.0	0.0	9.0	0.0	344.0
1998-99	0.0	0.0	0.0	0.0	0.0	0.0	6.0	0.0	0.0	105.0	0.0	111.0
1999-00	0.0	0.0	0.0	0.0	0.0	0.0	7.0	27.0	0.0	526.0	0.0	560.0
2000-01	0.0	7.0	0.0	0.0	0.0	10.0	125.0	18.0	0.0	35.0	1.0	197.0
2001-02	0.0	7.0	0.0	0.0	0.0	10.6	125.0	17.6	0.0	15.8	0.8	177.0
2002-03	95.0	322.0	0.0	0.0	0.0	3.5	271.6	0.0	0.9	0.0	0.0	693.0
2003-04	0.0	909.0	0.0	0.0	0.0	21.0	288.0	0.0	0.0	2.2	0.0	1,222.0
2004-05	95.0	38.0	0.0	8.8	0.0	4.4	233.6	0.0	0.0	143.0	0.0	523.2
2005-06	86.0	6.0	0.0	0.0	4.0	3.0	696.0	0.0	0.0	291.0	0.0	1,086.0
2006-07	0.9	7.0	0.0	110.2	0.0	4.4	768.0	0.0	0.0	130.5	0.0	1,022.0
TOTAL												
Mktg Yr	Australia	Belg	Canada	China	Czech	France	Germany	NZ	Poland	U.K.	Other	Total
1997-98	187.0	0.0	203.0	0.0	269.0	1,283.0	7,879.0	516.0	2.0	531.0	99.0	10,970.0
1998-99	287.0	44.0	0.0	0.0	174.0	1,402.0	7,821.0	306.0	0.0	363.0	25.0	10,422.0
1999-00	222.0	0.0	2.0	0.0	665.0	1,774.0	7,442.0	638.0	20.0	837.0	11.0	11,614.0
2000-01	1,007	34.0	0.0	0.0	82.0	2,324.0	4,831.0	621.0	0.0	296.0	1.0	9,205.0
2001-02	562.4	7.0	0.0	0.0	179.0	2,170.0	5,876.0	60.0	0.0	392.0	0.8	9,304.0
2002-03	95.0	322.0	0.0	915.0	93.0	2,213.0	5,772.0	206.0	0.9	345.0	1,451.0	11,445.0
2003-04	1,419	910.0	4.0	0.0	254.0	4,589.0	11,097.0	843.0	2.0	646.0	34.7	19,799.0
2004-05	578.5	38.1	0.0	8.8	161.0	98.1	8,086.0	190.0	11.7	434.0	17.6	9,623.8
2005-06	423.0	16.0	0.0	0.0	133.0	8.0	8,408.0	67.0	12.0	683.0	36.0	9,786.0
2006-07	450.9	7.0	0.0	119.9	69.0	9.4	7,973.5	124.5	25.1	613.5	297.2	9,594.8

SOURCE: U.S.D.A. Foreign Agricultural Service. Prepared by HGA. Each year represents September through August.

* This number represents 519,632 pounds from Spain that were extracted in the U.S. and then sent back to Europe.

WORLD BEER PRODUCTION 2005-2007 (MILLION HL)

	2004	2005	2006	2007
Russia	84.2	89.2	99.8	109.8
Germany	105.8	105.3	106.8	106.0
Great Britain	58.8	56.0	54.1	54.2
Spain	30.2	31.0	33.6	35.0
Poland	28.0	29.0	33.0	33.5
Ukraine	19.2	24.0	27.2	30.0
Netherlands	23.8	24.6	26.5	26.3
Czech Republic	18.8	19.1	19.8	20.0
Belgium	17.4	17.2	18.3	18.3
Romania	13.8	15.4	17.0	17.5
France	18.6	18.5	17.0	16.5
Italy	13.2	12.3	12.8	13.1
Ireland	8.1	8.9	9.2	9.3
Turkey	8.2	8.9	9.1	9.2
Austria	8.7	8.9	8.9	9.0
Denmark	8.6	8.7	8.9	8.9
Other Europe	66.0	67.4	70.3	71.1
Total Europe	531.4	544.4	572.3	587.7
USA	234.4	230.8	231.6	232.8
Brazil	82.6	88.0	94.0	97.0
Mexico	62.0	70.0	78.1	80.0
Venezuela	21.6	22.0	23.0	25.0
Canada	23.1	23.2	23.6	23.8
Colombia	12.8	14.0	15.0	16.0
Argentina	13.1	13.5	13.9	14.0
Other Americas	34.2	35.7	38.8	41.3
Total Americas	483.8	497.2	518.0	529.9
China	291.0	315.0	352.0	370.0
Japan	65.5	65.1	63.0	58.0
Thailand	23.5	22.5	23.0	23.5
South Korea	20.0	18.2	18.0	18.5
Vietnam	11.7	14.0	17.0	18.5
Philippines	12.5	13.0	13.5	13.7
Other Asia	24.3	27.1	27.1	32.0
Total Asia	448.5	474.9	513.6	534.2
South Africa	25.5	26.0	26.5	28.0
Nigeria	8.4	9.5	11.0	11.5
Other Africa	33.2	37.3	41.1	43.2
Total Africa	67.1	72.8	78.6	82.7
Australia	16.9	17.0	17.2	17.4
New Zealand	3.1	3.1	3.1	3.1
Oceania	1.0	1.2	1.0	1.0
Total Australia	21.0	21.3	21.3	21.5
WORLD TOTALS	1,551.8	1,610.6	1,703.8	1,756.0

SOURCE: Hopsteiner – Guidelines for Hop Buying 2007. Prepared by HGA.