



USA Hops

2005

STATISTICAL REPORT

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50TH ANNUAL HGA CONVENTION
YAKIMA, WASHINGTON

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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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Statistical Overview

	1995	2005	Change 95/2005	% Change 95/2005
HOP PRODUCTION (POUNDS)				
United States	78,852,400	52,914,500	-25,937,900	-32.89%
Germany	76,476,000	75,397,000	-1,079,000	-1.41%
World	230,001,000	201,122,351	-28,878,649	-12.56%
IHGC AROMA ACREAGE				
United States	16,049	10,648	-5,401	-33.65%
Germany	33,581	24,166	-9,415	-28.04%
World	106,171	61,997	-44,174	-41.61%
IHGC ALPHA ACREAGE				
United States	27,381	18,540	-8,841	-32.29%
Germany	20,497	17,243	-3,254	-15.88%
World	63,223	57,776	-5,447	-8.62%
IHGC TOTAL HOP ACREAGE				
United States	43,430	29,188	-14,242	-32.79%
Germany	54,078	42,402	-11,676	-21.59%
World	169,394	123,609	-45,785	-27.03%
U.S. CROP QUALITY (%)				
Leaf & Stem Content	0.80	0.09	-0.71	-88.75%
Seed Content	0.62	0.80	0.18	29.03%
ALPHA ACID PRODUCTION (POUNDS)				
United States	7,055,000	5,732,000	-1,323,000	-18.75%
Germany	4,012,000	7,213,000	3,201,000	79.79%
World	15,175,000	17,707,347	2,532,347	16.69%
BEER PRODUCTION (Million HL)				
United States	199.2	232.7	34	16.82%
China	131.8	105.8	-26	-19.73%
World	1064.9	1580.8	516	48.45%
U.S. HOP EXPORTS (POUNDS)				
Germany	7,629,000	3,747,413	-3,881,587	-50.88%
Mexico	5,567,000	7,223,437	1,656,437	29.75%
Belgium-Luxembourg	1,515,000	7,945,671	6,430,671	424.47%
Canada	3,272,000	5,464,371	2,192,371	67.00%
Total	51,084,000	59,150,175	8,066,175	15.79%
U.S. HOP IMPORTS (POUNDS)				
Germany	7,579,000	8,086,326	507,326	6.69%
France	1,224,000	98,106	-1,125,894	-91.98%
China	42,000	8,818	-33,182	-79.00%
Total Imports	12,767,000	9,623,872	-3,143,128	-24.62%

U.S. HOP PRODUCTION BY STATE AND VARIETY 2001 – 2005

STATE & VARIETY	HOP PRODUCTION (POUNDS)					2005
	2001	2002	2003	2004	2005	% +/-
IDAHO						
Chinook	195,200	-	-	-	-	-
Cluster	363,400	-	-	-	-	-
Galena	823,500	-	-	-	-	-
Mt. Hood	38,400	-	-	-	-	-
Nugget	81,000	-	-	-	-	-
Willamette	231,500	-	-	-	-	-
Zeus	893,000	-	-	-	-	-
Other Varieties	1,983,300	-	-	-	-	-
Total Idaho	4,609,300	5,519,600	5,266,300	5,165,000	5,390,900	4.37%
OREGON						
Cascade	-	320,500	-	126,800	84,600	-33.28%
Glacier	-	-	165,800	369,600	307,200	-16.88%
Golding	2/	-	94,600	137,400	106,800	-22.27%
Millennium	300,700	631,900	-	536,000	553,400	3.25%
Mt. Hood	506,300	420,100	340,400	348,400	309,600	-11.14%
Nugget	5,545,300	3,996,900	3,316,400	2,866,000	2,788,800	-2.69%
Perle	665,300	525,700	461,800	343,800	-	-
Sterling	187,900	163,000	168,400	268,400	400,400	49.18%
Willamette	3,463,600	2,921,500	3,045,000	3,277,200	3,147,800	-3.95%
Other Varieties	774,100	405,600	1,755,200	338,400	355,400	5.02%
Total Oregon	11,443,200	9,438,000	9,347,600	8,612,000	8,054,000	-6.48%
WASHINGTON						
Ahtanum	-	-	-	-	99,300	-
Cascade	1,790,400	2,125,600	3,833,000	2,852,500	2,378,000	-16.63%
Centennial	-	-	-	-	154,000	-
Chelan	573,500	652,200	458,100	498,000	475,700	-4.48%
Chinook	918,600	802,600	862,100	934,800	901,700	-3.54%
Cluster	1,045,600	958,100	861,300	913,300	825,100	-9.66%
Columbus/Tomahawk	12,253,100	10,534,800	7,515,800	7,745,200	7,075,000	-8.65%
Galena	7,345,600	6,170,300	5,466,400	6,355,600	6,720,500	5.74%
Glacier	-	-	-	-	51,000	-
Golding	55,400	30,900	24,600	35,600	32,800	-7.87%
Hallertauer	73,600	90,700	46,900	48,600	46,400	-4.53%
Horizon	414,900	474,800	193,100	-	-	-
Millennium	2,815,100	3,417,800	3,142,100	2,629,000	2,127,400	-19.08%
Mt. Hood	376,300	136,100	47,200	54,100	64,800	19.78%
Northern Brewer	124,500	193,200	114,100	142,100	-	-
Nugget	8,086,500	2,698,400	1,727,700	1,672,900	1,834,100	9.64%
Palisade	-	-	-	-	149,000	-
Perle	226,300	120,200	95,600	58,500	-	-
Sterling	-	-	-	-	142,000	-
Tillicum	677,500	402,600	451,100	-	-	-
Willamette	4,674,400	5,025,500	4,855,100	4,997,800	5,468,000	9.41%
YCR5 (Warrior TM)	2,670,100	2,099,500	2,640,500	1,823,900	1,068,700	-41.41%
Zeus	5,834,400	6,779,100	6,775,000	9,071,900	8,424,700	-7.13%
Other*	119,924	82,000	841,500	1,591,900	1,431,400	-10.08%
Total Washington	50,779,600	43,379,000	39,951,200	41,426,900	39,469,600	-4.72%
Total United States	66,832,100	58,336,600	54,565,100	55,203,900	52,914,500	-4.15%

SOURCE: U.S.D.A. Prepared by HGA. – 1/ unknown or none; 2/ Included in the category "other varieties" to avoid disclosure of individual operations. *Other varieties can no longer be broken down into alpha and aroma.

U.S. HOP ACREAGE BY STATE AND VARIETY 2001 – 2005

STATE & VARIETY	ACRES HARVESTED					2005
	2001	2002	2003	2004	2005	% +/-
IDAHO						
Chinook	120	-	-	-	-	-
Cluster	234	-	-	-	-	-
Galena	552	-	-	-	-	-
Mt. Hood	32	-	-	-	-	-
Nugget	54	-	-	-	-	-
Willamette	215	-	-	-	-	-
Zeus	477	-	-	-	-	-
Other Varieties	1,785	-	-	-	-	-
Total Idaho	3,469	3,399	3,429	3,253	3,287	1.05%
OREGON						
Cascade	-	217	-	91	62	-31.87%
Glacier	-	-	245	243	231	-4.94%
Golding	2/	-	95	105	105	0.00%
Millennium	117	421	-	264	295	11.74%
Mt. Hood	257	243	217	215	219	1.86%
Nugget	2,268	1,967	1,529	1,286	1,363	5.99%
Perle	491	452	450	259	-	-
Sterling	91	86	84	222	276	24.32%
Willamette	2,434	1,912	2,224	2,175	2,273	4.51%
Other Varieties	445	243	904	247	339	37.25%
Total Oregon	6,103	5,577	5,748	5,107	5,163	1.10%
WASHINGTON						
Ahtanum	-	-	-	-	131	-
Cascade	1,003	1,216	2,120	1,422	1,168	-17.86%
Centennial	-	-	-	-	112	-
Chelan	317	295	180	201	212	5.47%
Chinook	535	422	453	492	489	-0.61%
Cluster	534	480	430	449	463	3.12%
Columbus/Tomahawk	4,915	3,663	2,738	3,029	2,812	-7.16%
Galena	4,375	3,239	2,856	3,417	3,869	13.23%
Glacier	-	-	-	-	48	-
Golding	45	26	22	36	37	2.78%
Hallertauer	76	76	53	46	48	4.35%
Horizon	339	337	135	-	-	-
Millennium	1,382	1,455	1,386	1,124	1,115	-0.80%
Mt. Hood	333	97	32	39	51	30.77%
Northern Brewer	97	107	65	65	-	-
Nugget	4,109	1,288	918	807	1,062	31.60%
Palisade	-	-	-	-	54	-
Perle	209	124	104	47	-	-
Sterling	-	-	-	-	93	-
Tillicum	369	194	194	-	-	-
Willamette	3,571	3,639	3,645	3,542	4,102	15.81%
YCR5 (Warrior TM)	1,370	988	1,242	793	584	-26.36%
Zeus	2,186	2,265	2,333	2,903	3,736	28.69%
Other*	98	51	586	970	908	-6.39%
Total Washington	26,339	20,333	19,492	19,382	21,094	8.83%
Total United States	35,911	29,309	28,669	27,742	29,544	6.50%

SOURCE: U.S.D.A. Prepared by HGA. – 1/ unknown or none; 2/ Included in the category "other varieties" to avoid disclosure of individual operations. *Other varieties can no longer be broken down into alpha and aroma.

U.S. HOP YIELDS BY STATE AND VARIETY 2001 – 2005

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2005
	2001	2002	2003	2004	2005	% +/-
IDAHO						
Chinook	1,627	-	-	-	-	-
Cluster	1,553	-	-	-	-	-
Galena	1,492	-	-	-	-	-
Mt. Hood	1,200	-	-	-	-	-
Nugget	1,500	-	-	-	-	-
Willamette	1,077	-	-	-	-	-
Zeus	1,872	-	-	-	-	-
Other Varieties	1,111	-	-	-	-	-
Total Idaho	1,329	1,624	1,536	1,588	1,640	3.27%
OREGON						
Cascade	-	1,477	-	1,393	1,365	-2.01%
Glacier	*	-	677	1,521	1,330	-12.56%
Golding	2/	-	996	1,309	1,017	-22.31%
Millennium	2,570	1,501	-	2,030	1,876	-7.59%
Mt. Hood	1,970	1,729	1,569	1,620	1,414	-12.72%
Nugget	2,445	2,032	2,169	2,229	2,046	-8.21%
Perle	1,355	1,163	1,026	1,327	-	-
Sterling	2,065	1,895	2,005	1,209	1,451	20.02%
Willamette	1,423	1,528	1,369	1,507	1,385	-8.10%
Other Varieties	1,740	1,669	1,942	1,370	1,048	-23.50%
Total Oregon	1,875	1,692	1,626	1,686	1,560	-7.47%
WASHINGTON						
Ahtanum	-	-	-	-	758	-
Cascade	1,785	1,748	1,808	2,006	2,036	1.50%
Centennial	-	-	-	-	1,375	-
Chelan	1,809	2,211	2,545	2,482	2,244	-9.59%
Chinook	1,717	1,902	1,903	1,900	1,844	-2.95%
Cluster	1,958	1,996	2,003	2,034	1,782	-12.39%
Columbus/Tomahawk	2,493	2,876	2,745	2,557	2,516	-1.60%
Galena	1,679	1,905	1,914	1,860	1,737	-6.61%
Glacier	-	-	-	-	1,063	-
Golding	1,231	1,188	1,118	989	886	-10.41%
Hallertauer	968	1,193	885	1,057	967	-8.51%
Horizon	1,224	1,409	1,430	-	-	-
Millennium	2,037	2,349	2,267	2,339	1,908	-18.43%
Mt. Hood	1,130	1,272	1,475	1,387	1,267	-8.65%
Northern Brewer	1,284	1,992	1,755	2,191	-	-
Nugget	1,968	2,095	1,882	2,073	1,727	-16.69%
Palisade	-	-	-	-	2,759	-
Perle	1,083	969	919	1,245	-	-
Sterling	-	-	-	-	1,527	-
Tillicum	1,836	2,075	2,325	-	-	-
Willamette	1,309	1,381	1,332	1,411	1,333	-5.53%
YCR5 (Warrior TM)	1,949	2,125	2,126	2,300	1,830	-20.43%
Zeus	2,669	2,993	2,904	3,125	2,255	-27.84%
Other*	1,224	1,610	1,436	1,641	1,576	-3.96%
Total Washington	1,928	2,133	2,050	2,137	1,871	-12.45%
Total United States	1,861	1,990	1,903	1,990	1,791	-10.00%

SOURCE: U.S.D.A. Prepared by HGA. – 1/ unknown or none; 2/ Included in the category "other varieties" to avoid disclosure of individual operations. *Other varieties can no longer be broken down into alpha and aroma.

U.S. HOP ACREAGE BY STATE 1995 – 2005 (IN ACRES)

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
1995	30,621	8,641	3,927	43,189
1996	31,678	8,486	3,997	44,161
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	21,094	5,163	3,287	29,544

SOURCE: USDA. Prepared by HGA

U.S. AVERAGE HOP YIELD 1995 – 2005

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL U.S.
1995	1,930	1,595	1,520	1,826
1996	1,820	1,383	1,400	1,698
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	1,871	1,560	1,640	1,791

SOURCE: USDA. Prepared by HGA

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

Marketing Year	SEASON AVERAGE PRICE				U.S. Production (Pounds x 1,000)	Total Crop Value (x 1,000)
	Washington	Oregon	Idaho	U.S.		
	----- (\$ / pound) -----					
1990	\$1.44	\$1.63	\$1.50	\$1.48	56,855	\$84,178
1991	\$1.68	\$1.71	\$1.59	\$1.68	69,155	\$115,997
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	\$1.95	\$2.13	\$1.58	\$1.94	58,336	\$113,413
2003	\$1.91	\$2.32	\$1.62	\$1.90	54,565	\$103,727
2004	\$1.85	\$2.31	\$1.60	\$1.90	55,203	\$104,798
2005	\$1.87	\$2.57	\$1.63	\$1.95	52,914	\$103,294

SOURCE: USDA. Prepared by HGA

2005 HOP INSPECTION REPORT

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

YEAR	WASHINGTON (%)	OREGON (%)	IDAHO (%)	TOTAL (%)
2001	250,454 (0.08)	57,321 (0.14)	22,568 (0.04)	330,343 (0.09)
2002	213,676 (0.07)	47,190 (0.32)	27,289 (0.04)	288,155 (0.11)
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 (0.47)	25,601 (0.08)	261,616 (0.15)

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

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	178,714	15,503	1,542	0	0	0	0	0	195,759
OR	23,082	15,892	1,026	200	56	0	0	0	40,256
ID	24,523	370	520	0	188	0	0	0	25,601
Total	226,319	31,765	3,088	200	244	0	0	0	261,616
% of Total	87	12	1	<1	<1	0	0	0	100

TABLE 3. Number of Bales in Each Seed Category

	0%	1%	2%	3%	4%	5%	6%	7+%	TOTAL
WA	134,342	32,316	12,504	8,361	3,888	2,401	541	1,406	195,759
OR	14,103	11,286	3,946	2,552	2,674	2,334	837	2,524	40,256
ID	23,628	1,502	271	0	200	0	0	0	25,601
Total	172,073	45,104	16,271	10,913	6,762	4,735	1,378	3,930	261,616
% of Total	66	17	6	4	3	2	<1	2	100

SOURCE: USDA. GIPSA. Federal Grain Inspection Service

U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE 1995 – 2005

Year	WASHINGTON	OREGON	IDAHO	U.S. AVERAGE %	
	Leaf & Stem	Leaf & Stem	Leaf & Stem	Leaf & Stem	Seed Content
1995	0.73	1.02	0.97	0.80	0.62
1996	0.48	1.14	0.69	0.60	0.55
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	0.07	0.12	0.02	0.08	0.50
2004	0.08	0.28	0.01	0.10	0.56
2005	0.09	0.47	0.08	0.09	0.80

SOURCE: USDA Federal Grain Inspection Service. Prepared by HGA

IHGC AROMA ACREAGE 2001 – 2005

COUNTRY	AROMA ACREAGE (IN ACRES)					2005
	2001	2002	2003	2004	2005	% +/-
Australia	7	7	7	7	16	128.57
Belgium	126	158	84	86	121	40.70
Bulgaria	222	190	178	178	178	0.00
China	464	464	464	464	1,331	186.85
Czech Rep.	13,825	13,662	13,980	13,227	13,323	0.73
France	1,837	1,886	1,857	1,717	1,781	3.73
Germany	25,360	24,309	22,269	23,122	24,166	4.52
New Zealand	452	484	580	635	625	-1.57
Poland	3,333	2,647	2,222	2,193	2,109	-3.83
Portugal	0	0	0	0	0	-
Russia	1,741	1,363	869	748	692	-7.49
Serbia - Montenegro	321	321	321	116	116	0.00
Slovakia	864	864	864	865	865	0.00
Slovenia	3,857	4,005	3,699	3,623	3,433	-5.24
South Africa	0	0	0	0	0	-
Spain	0	0	0	0	0	-
Ukraine	2,617	2,160	2,560	1,882	2,211	17.48
UK - England	2,896	2,647	2,094	2,043	2,179	6.66
USA	10,756	10,931	12,491	11,411	10,648	-6.69
IHGC Total	68,679	66,617	65,035	62,318	61,997	-0.52

SOURCE: IHGC November 2005 Report

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

IHGC ALPHA ACREAGE 2001 – 2005

COUNTRY	ALPHA ACREAGE (IN ACRES)					2005
	2001	2002	2003	2004	2005	% +/-
Australia	1,923	2,072	1,077	1,317	1,094	-16.93
Belgium	457	459	449	393	326	-17.05
Bulgaria	679	400	368	368	368	0.00
China	11,160	12,314	13,467	11,234	9,537	-15.11
Czech Rep.	417	304	437	506	576	13.83
France	123	109	86	91	100	9.89
Germany	18,780	18,820	18,610	18,276	17,243	-5.65
New Zealand	521	519	472	408	371	-9.07
Poland	2,099	2,778	3,284	3,285	3,421	4.14
Portugal	94	91	91	91	91	0.00
Russia	778	612	612	524	652	24.43
Serbia - Montenegro	793	741	602	491	291	-40.73
Slovakia	0	0	0	0	0	-
Slovenia	235	247	259	227	178	-21.59
South Africa	1,205	1,220	1,242	1,242	1,250	0.64
Spain	1,906	1,802	1,802	1,680	1,680	0.00
Ukraine	840	980	1,494	1,218	1,405	15.35
UK - England	1,790	1,790	1,444	1,237	753	-39.13
USA	24,541	18,146	16,007	16,608	18,540	11.63
IHGC Total	68,341	63,420	61,827	56,229	57,776	2.75

SOURCE: IHGC November 2005 Report

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

IHGC TOTAL ACREAGE 2001 – 2005

COUNTRY	TOTAL ACREAGE (IN ACRES)					2005
	2001	2002	2003	2004	2005	% +/-
Australia	1,931	2,128	1,084	1,323	1,109	-16.18
Belgium	602	617	533	487	447	-8.21
Bulgaria	938	590	546	546	546	0.00
China	11,884	13,930	13,931	11,697	11,486	-1.80
Czech Rep.	15,000	14,735	14,417	14,420	14,010	-2.84
France	2,015	2,009	1,943	1,944	1,978	1.75
Germany	46,965	45,318	40,879	43,168	42,402	-1.77
New Zealand	973	1,002	1,052	1,042	995	-4.51
Poland	5,556	5,424	5,506	5,478	5,530	0.95
Portugal	94	91	91	91	91	0.00
Russia	2,716	2,128	1,481	1,370	1,344	-1.90
Serbia - Montenegro	1,185	1,217	923	607	408	-32.78
Slovakia	864	864	864	865	865	0.00
Slovenia	4,462	4,484	3,958	3,982	3,732	-6.28
South Africa	1,235	1,234	1,242	1,242	1,250	0.64
Spain	1,906	1,802	1,802	1,680	1,680	0.00
Ukraine	4,642	4,390	4,054	3,616	3,616	0.00
UK - England	5,035	4,681	3,538	3,354	2,932	-12.58
USA	35,891	29,293	28,499	28,020	29,188	4.17
IHGC Total	144,457	135,944	126,862	119,943	123,609	3.06

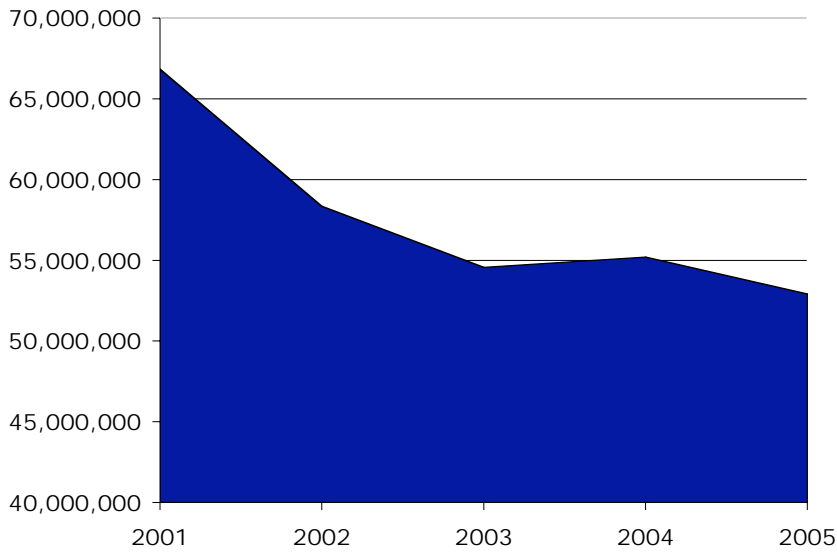
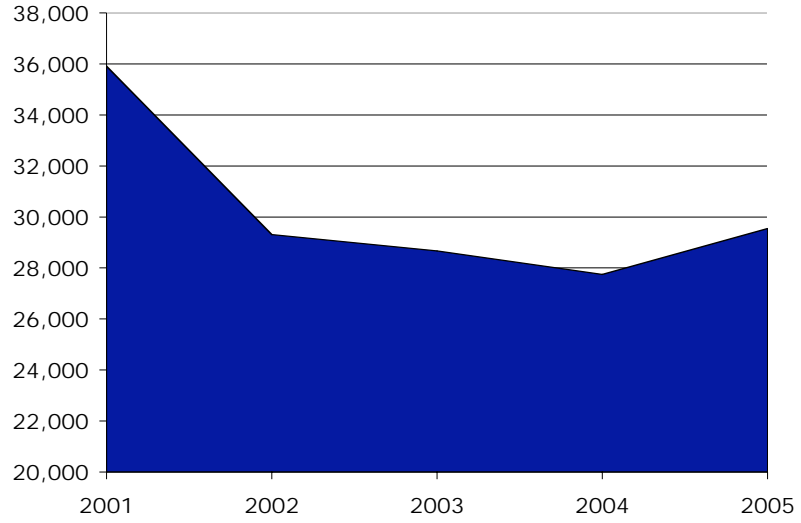
SOURCE: IHGC November 2001-05 Reports, IHGC Total Acreage includes baby acreage (not included in separate aroma and alpha tables. Numbers may not total exactly due to rounding and standard/metric conversions.

2005 WORLD HOP ACREAGE AND PRODUCTION

COUNTRY	HOP ACREAGE (acres)				HOP PRODUCTION (pounds)			
	AROMA	ALPHA	TOTAL	NEW	AROMA	ALPHA	TOTAL	Alpha MT.
Australia	16	1094	1109	0	15432	2713863	2729295	158
Belgium	121	326	447	17	114639	661380	776019	29
Bulgaria	178	368	546	0	224869	529104	753973	34.5
China	1331	9537	11486	618	2147280	21168569	23315850	644
Czech Rep.	13323	576	14010	109	14131486	1106709	15238195	262
France	1781	100	1978	97	2883176	141976	3025152	33
Germany	24166	17243	42402	993	41446480	33950840	75397320	3272
New Zealand	625	371	995	0	1166233	694449	1862887	83
Poland	2109	3421	5530	0	2380968	4007963	6388931	188.28
Portugal	0	91	91	0	0	125662	125662	5.5
Russia	692	652	1344	89	310849	394623	705472	15
Serbia - Montenegro	116	291	408	0	165345	496035	661380	16
Slovakia	865	0	865	0	771610	0	771610	14
Slovenia	3433	178	3732	121	4916258	198414	5114672	192
South Africa	0	1250	1250	0	0	2089961	2089961	130
Spain	0	1680	1680	0	0	3388470	3388470	153.7
Ukraine	2211	1405	3616	0	1992958	1254417	3249580	59.5
UK - England	2179	753	2932	40	2724886	1007502	3732388	207.6
USA	10648	18540	29188	0	14711296	37083356	51795534	2600
2005 IHGC Totals	61997	57776	123609	2083	90103766	110871318	201122351	8032.1

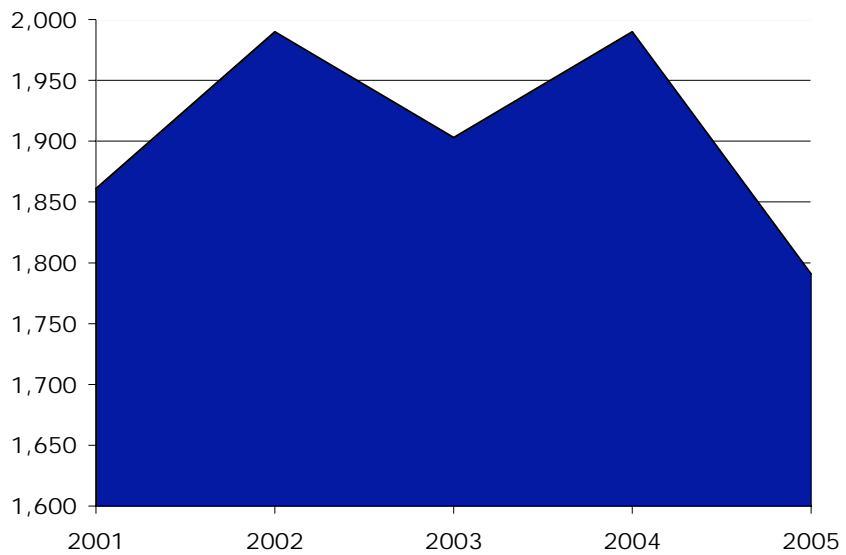
SOURCE: November 2005 IHGC Report. Some errors were corrected during preparation of this report. Numbers may not total exactly due to rounding and standard/metric conversions.

**U.S. TOTAL
ACREAGE
2001 - 2005**

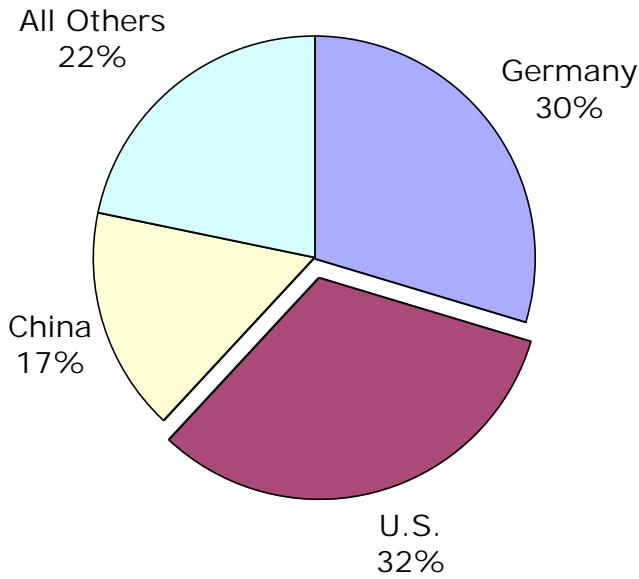


**U.S. TOTAL
PRODUCTION
2001 - 2005**

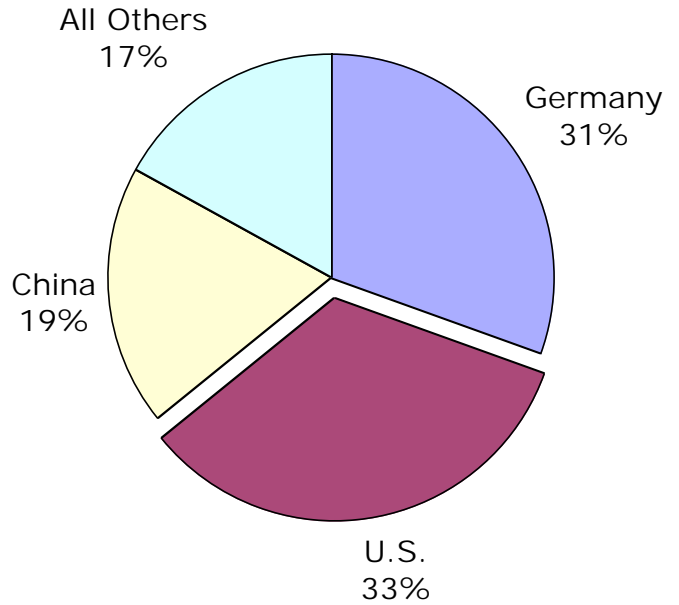
**U.S.
AVERAGE
YIELD
PER ACRE
2001 - 2005**



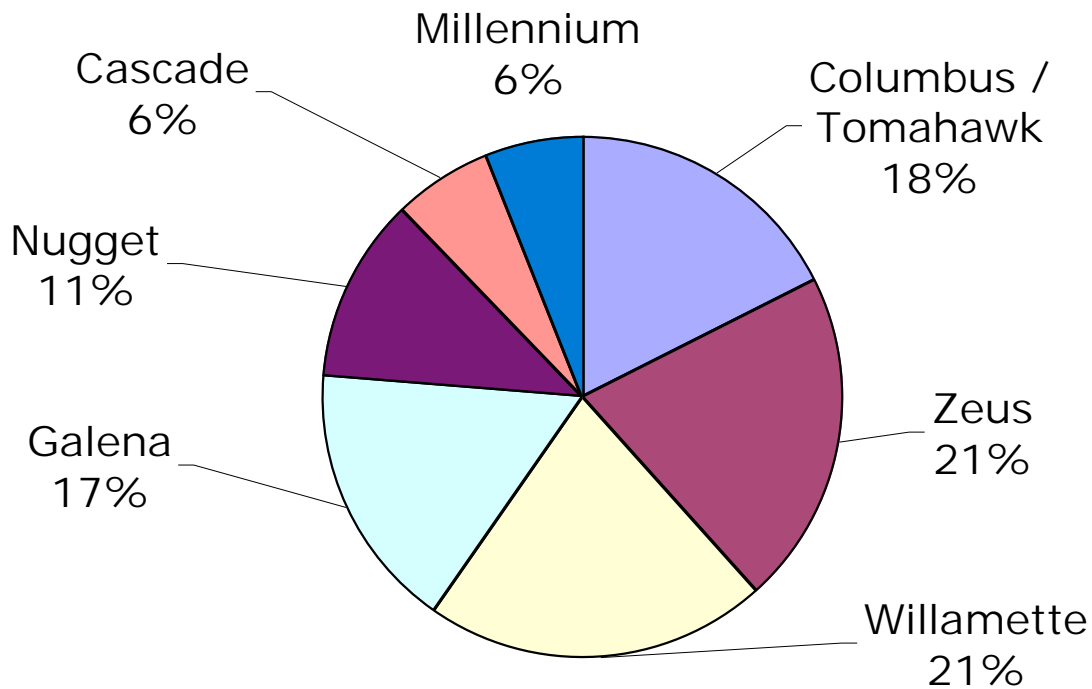
2005 ALPHA ACREAGE FOR THE 3 LARGEST PRODUCERS & THE % OF WORLD ALPHA ACREAGE THEY REPRESENT



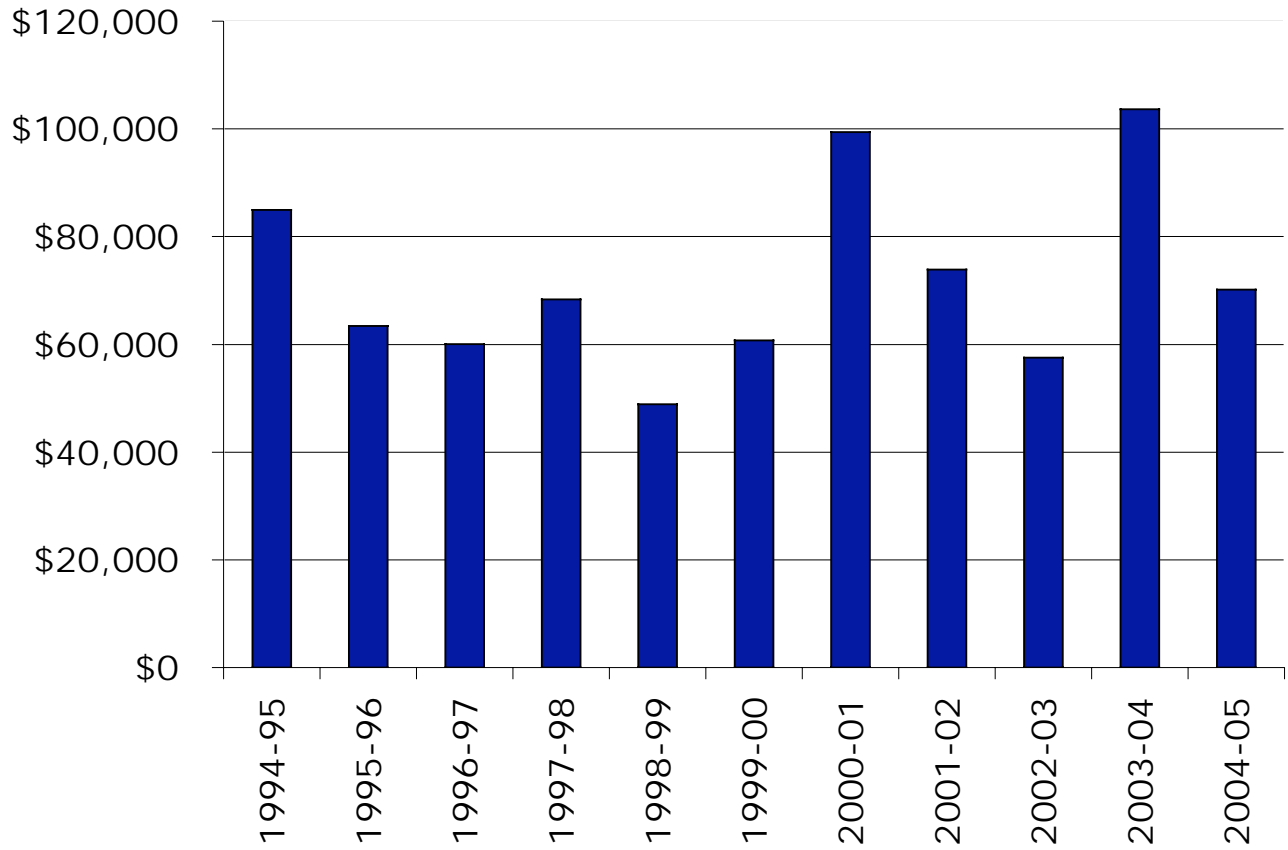
ALPHA HOP PRODUCTION FOR THE 3 LARGEST PRODUCERS & THE % OF WORLD ALPHA HOP PRODUCTION THEY REPRESENT



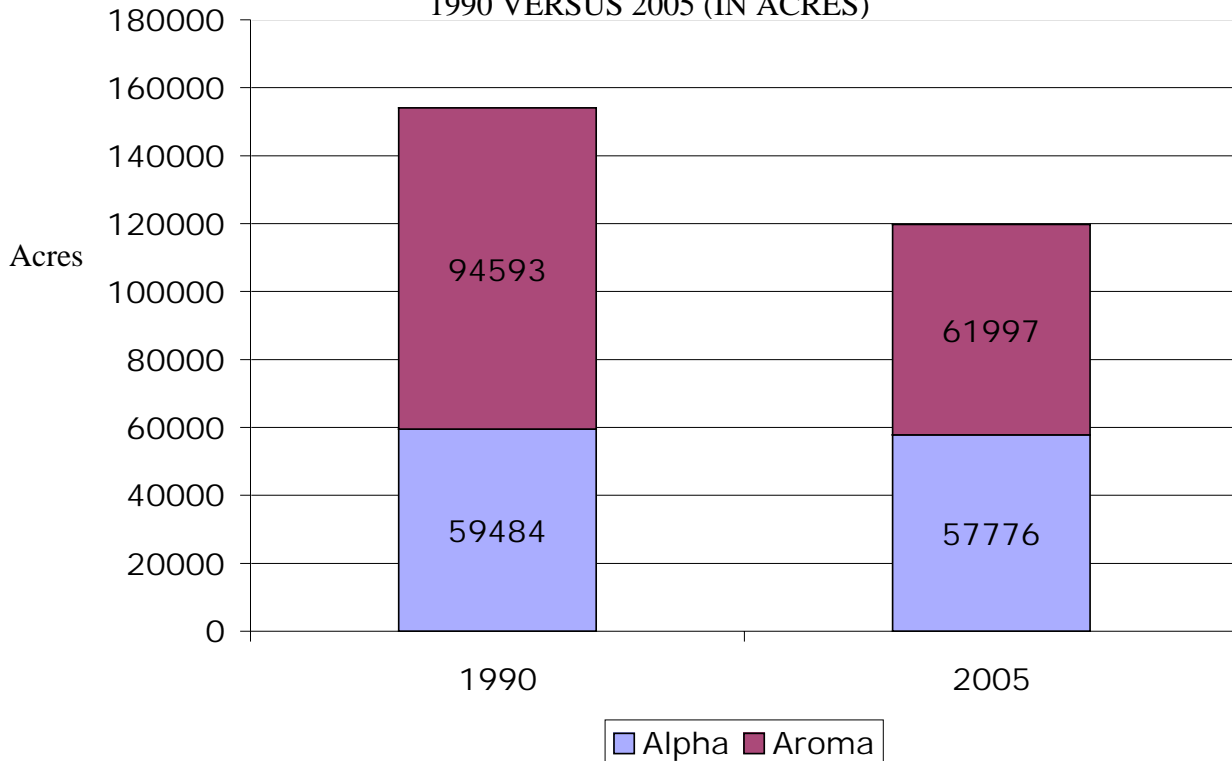
SEVEN MOST WIDELY-PLANTED VARIETIES PRODUCED IN THE U.S. AND THE % OF THE TOTAL AMERICAN PRODUCTION THEY REPRESENT



1994-95 – 2004-05 U.S. HOP TRADE SURPLUS



COMPOSITION OF WORLD HOP ACREAGE
1990 VERSUS 2005 (IN ACRES)



IHGC SOLD AHEAD SURVEY 2005 – 2010 (as reported in November 2005)

COUNTRY	(Pounds contracted, % based on 2005 production)						
	2005 Production (Pounds)	2005	2006	2007	2008	2009	2010 & Beyond
Australia	2,729,295	No Data	No Data	No Data	No Data	No Data	No Data
Belgium	776,019	143,299	110,230	55,115	55,115	0	0
Bulgaria	753,973	418,874	462,966	0	0	0	0
China	23,315,850	8,818,400	0	0	0	0	0
Czech Rep.	15,238,195	14,476,285	12,190,556	4,571,459	3,047,639	0	0
France	3,025,152	2,204,600	330,690	110,230	110,230	110,230	110,230
Germany	75,397,320	48,501,200	33,509,920	20,723,240	12,566,220	4,409,200	813,497
New Zealand	1,862,887	1,393,307	1,049,390	429,897	403,442	0	0
Poland	6,388,931	5,511,500	4,850,120	4,850,120	2,425,060	2,425,060	0
Portugal	125,662	No Data	No Data	No Data	No Data	No Data	No Data
Russia	705,472	264,552	286,598	0	0	0	0
Serbia - Montenegro	661,380	No Data	No Data	No Data	No Data	No Data	No Data
Slovakia	771,610	551,150	551,150	551,150	0	0	0
Slovenia	5,114,672	4,850,120	2,314,830	1,763,680	661,380	0	0
South Africa	2,089,961	2,089,961	0	0	0	0	0
Spain	3,388,470	No Data	No Data	No Data	No Data	No Data	No Data
Ukraine	3,249,580	No Data	No Data	No Data	No Data	No Data	No Data
UK - England	3,732,388	2,612,671	1,866,194	1,119,716	0	0	0
USA	51,795,534	36,986,628	22,219,833	10,988,003	8,833,468	5,563,259	0
Contracted Pounds		128,822,548	79,742,477	45,162,610	28,102,554	12,507,749	923,727
Contracted %		64.1%	39.6%	22.5%	14.0%	6.2%	0.5%

SOURCE: IHGC. USDA. Prepared by HGA. -/ information not reported to IHGC

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

* Information originally reported in Sold Ahead Survey, March 2005, U.S. production estimate updated to reflect actuals.

U.S. ADJUSTED SOLD AHEAD SURVEY RESULTS 2001 – 2005

REPORT YEAR (2005)	REPORT YEAR PRODUCTION	Percent Sold Ahead Based on Report Year Production				
		N	N+1	N+2	N+3	N+4
2001	66,832,100	72%	45%	35%	25%	4%
2002	58,336,600	76%	56%	33%	25%	3%
2003	54,565,100	74%	49%	34%	18%	N/A
2004	55,203,900	79%	51%	34%	21%	N/A
2005	52,914,500	70%	42%	21%	17%	11%

- The U.S. Sold Ahead survey was issued in March 2005 using crop production figures from the previous year (in this case 2004). To provide a more accurate picture of the actual percentage of the crop contracted, these figures must be adjusted once the current year's production has been measured.
- The U.S. Sold Ahead percentages listed above include both alpha and aroma hops. Aroma varieties are typically contracted at a much higher level than alpha hops.

WORLD HOP ACREAGE & PERCENT SHARE (acres)

COUNTRY	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Germany	53,897 26%	52,830 30%	48,638 33%	45,177 32%	45,915 32%	46,965 33%	45,318 33%	40,879 32%	43,168 36%	42,404 34%
England	7,843 4%	7,764 4%	6,047 4%	5,636 4%	4,828 3%	5,035 3%	4,681 3%	3,538 3%	3,354 2.7%	2,932 2%
Czech	25,587 13%	20,411 12%	15,091 10%	15,842 11%	16,703 12%	15,864 11%	14,735 11%	14,417 11%	14,420 12%	14,010 11%
Europe (rest)	41,500 20%	32,447 18%	25,840 17%	24,844 17%	25,682 18%	24,679 17%	23,616 17%	22,217 18%	20,666 17.2%	20,236 16%
USA	44,161 22%	43,301 24%	36,673 25%	34,260 24%	36,404 25%	35,891 25%	29,309 22%	28,669 23%	28,020 23.3%	29,188 24%
China	16,300 8%	12,355 7%	10,556 7%	10,556 7%	10,829 7%	11,884 8%	13,930 10%	13,931 11%	11,697 9.7%	11,846 10%
World (rest)	14,250 7%	7,645 4%	6,577 4%	6,530 5%	3,255 2%	4,139 3%	4,364 3%	3,211 3%	3,607 3%	3,354 3%
World Totals	203,538	176,753	149,422	142,845	143,616	144,457	135,944	126,862	119,943	123,609

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

COUNTRY	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Germany	81,571 29%	74,957 30%	68,166 33%	60,462 29%	62,709 30%	68,343 32%	69,444 34%	55,115 30%	73,854 36.3%	75,397 37%
England	11,250 4%	9,433 4%	7,209 3%	6,945 3%	6,082 3%	6,019 3%	5,849 3%	4,202 2%	3,525 1.7%	3,732 2%
Czech	24,141 9%	18,105 7%	11,751 6%	14,771 7%	10,815 5.1%	14,669 7%	13,668 7%	11,219 6%	13,889 6.8%	15,238 8%
Europe (rest)	35,819 13%	29,533 12%	24,857 12%	25,904 13%	23,174 11%	22,704 11%	18,178 9%	20,388 11%	23,745 11.6%	24,960 12%
USA	74,971 27%	74,872 30%	59,548 29%	64,455 31%	67,576 32%	66,832 31%	58,336 28%	54,565 30%	55,200 27%	51,796 26%
China	35,274 13%	26,786 11%	26,581 13%	26,455 13%	33,152 15%	29,786 14%	31,224 15%	30,662 17%	25,882 12.7%	23,315 12%
World (rest)	17,538 6%	12,566 5%	8,823 4%	7,685 4%	7,937 4%	8,114 4%	9,332 5%	8,013 4%	7,095 3.5%	6,682 3%
World Totals	280,563	246,252	206,935	206,677	211,445	215,639	206,031	184,164	203,259	201,122

SOURCE: USDA, IHGC, Merchant Reports. Prepared by HGA

MARCH 1 & SEPTEMBER 1 U.S. HOP STOCKS 1990 – 2005

Year	MARCH 1			SEPTEMBER 1		
	Brewer	Dealer / Grower	TOTAL	Brewer	Dealer / Grower	TOTAL
1990	57,850	18,790	76,640	46,810	5,080	51,890
1991	56,950	18,370	75,320	45,200	9,000	54,200
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

SOURCE: USDA NASS. Prepared by HGA.

-/ included in dealer stocks to avoid disclosure of individual operations.

U.S. HOP TRADE BALANCE 1994/95 – 2004/05

Year	Value of Hop Imports ¹	Value of U.S. Hop Exports ²	TRADE SURPLUS
	----- (x US\$1,000) -----		
1994-95	\$41,415	\$126,400	\$84,985
1995-96	\$41,856	\$105,304	\$63,448
1996-97	\$39,232	\$99,245	\$60,013
1997-98	\$29,273	\$97,603	\$68,330
1998-99	\$28,733	\$77,615	\$48,882
1999-00	\$28,916	\$89,623	\$60,707
2000-01	\$21,874	\$121,315	\$99,441
2001-02	\$24,060	\$97,912	\$73,852
2002-03	\$31,803	\$89,301	\$57,498
2003-04	\$19,799	\$123,453	\$103,655
2004-05	\$35,913	\$106,096	\$70,183

SOURCE USDA Hop Market News. Prepared by HGA

1/ Import price is defined generally as market value in foreign country excluding import duties, ocean freight and marine insurance

2/ Export price is value of exportation based on selling price, inland freight, insurance and other charges to port.

U.S. & GERMAN ALPHA ACID PRODUCTION 1995–2005

YEAR	UNITED STATES		GERMANY	
	Pounds** (x 1,000)	Avg. Alpha*	Pounds (x 1,000)	Avg. Alpha
1995	7,387	9.4	3,937	5.2
1996	7,396	9.9	6,424	7.9
1997	7,352	9.8	5,911	7.9
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

SOURCE: Hop Merchants. Prepared by HGA. * U.S. figures were converted to comparable EBC October/November figures for more accurate comparison by making an 8% adjustment downward in alpha values. Average figures calculated by taking total alpha produced divided by total pounds produced. U.S. and German figures from 1998-2000 have been revised using this method. **All figures are total production, which includes estimates of alpha acid produced but later destroyed by fire.

U.S. HOP EXPORTS – TOP 20 DESTINATIONS FOR U.S. HOPS

SEPTEMBER 2004 – AUGUST 2005 (Pounds)						
COUNTRY		CONES	PELLETS	EXTRACT	TOTAL	PERCENT OF TOTAL
1	BELGIUM-LUXEMBOURG	23,149	2,985,055	4,937,467	7,945,671	13.43%
2	MEXICO	30,424	220,242	6,972,772	7,223,437	12.21%
3	CANADA	73,855	1,039,478	4,351,038	5,464,371	9.24%
4	BRAZIL	25,353	2,085,791	2,166,701	4,277,845	7.23%
5	GERMANY	0	1,183,881	2,563,532	3,747,413	6.34%
6	UNITED KINGDOM	257,500	335,764	2,362,471	2,955,734	5.00%
7	CHINA	13,228	217,155	2,691,400	2,921,783	4.94%
8	KOREA	0	192,904	2,385,399	2,578,303	4.36%
9	DOMINICAN REPUBLIC	0	7,496	2,043,242	2,050,738	3.47%
10	THAILAND	0	391,981	1,562,635	1,954,616	3.30%
11	VENEZUELA	0	33,290	1,730,186	1,763,476	2.98%
12	PERU	0	23,810	1,438,294	1,462,104	2.47%
13	COLOMBIA	3,748	403,225	876,557	1,283,530	2.17%
14	JAPAN	496,921	548,289	117,286	1,162,496	1.97%
15	AUSTRALIA	17,637	18,960	1,115,538	1,152,134	1.95%
16	NETHERLANDS	0	37,699	1,112,892	1,150,591	1.95%
17	HONG KONG	0	212,746	923,295	1,136,041	1.92%
18	PHILIPPINES	0	28,660	928,586	957,246	1.62%
19	RUSSIA	6,173	797,191	63,493	866,857	1.47%
20	ARGENTINA	229,721	48,722	581,138	859,581	1.45%
	Sub total	1,177,709	10,812,338	40,923,920	52,913,967	89.5%
	All Other Countries	95,018	809,536	5,331,653	6,236,208	10.5%
	TOTAL EXPORTS	1,272,727	11,621,875	46,255,573	59,150,175	100%

SOURCE: U.S. Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics. Prepared by HGA

U.S. HOP EXPORTS – REGIONAL ANALYSIS

PERCENT OF TOTAL U.S. HOP EXPORTS				
REGION	2001-2002	2002-2003	2003-2004	2004-2005
EUROPE	30%	32%	39.8%	29.95%
NORTH AMERICA	26%	25%	21.8%	21.45%
ASIA	15%	18.4%	13.7%	19.77%
SOUTH AMERICA	19%	15.6%	18.4%	19.75%
CARIBBEAN	4%	4%	2.6%	4.54%
ALL OTHERS	6%	4%	3.7%	4.53%

SOURCE: U.S. Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics. Prepared by HGA

WORLD BEER PRODUCTION 1998-2004 (MILLION HL)

	1999	2000	2001	2002	2003	2004	2005
Germany	112.8	110.4	108.5	109.0	105.5	105.8	105.8
Great Britain	57.9	55.3	56.8	56.8	58	58.8	58.9
Russia	45.9	60.5	65.0	70.0	75.6	84.2	88.4
Spain	25.9	26.5	27.7	28.0	29.7	30.2	30.2
Netherlands	24.5	25.1	25.2	25.3	25.1	23.8	23.0
France	19.8	18.9	18.9	18.9	18.1	18.6	18.6
Poland	22.5	23.5	24.1	24.2	27.3	28.0	28.5
Czech Republic	17.9	18.0	17.9	17.5	17.9	18.8	19.0
Belgium	14.2	14.7	15.0	15.1	15.7	17.4	17.2
Italy	12.1	12.6	12.6	12.4	13.7	13.2	13.3
Austria	8.9	8.8	8.6	8.8	8.9	8.7	8.9
Denmark	8	7.5	7.2	7.2	8.3	8.6	8.6
USA	236.5	233.0	231.0	233.0	230.4	234.4	232.7
Brazil	88.6	90.0	83.0	85.0	83.0	82.6	85.0
Mexico	57.3	60.3	63.5	65.0	66.4	62.0	63.0
Canada	22.9	23.0	23.2	23.2	23.0	23.1	23.2
Colombia	16.5	16.5	16.0	16.0	15.5	12.8	13.0
Venezuela	17.1	15.5	15.8	16.0	15.0	21.6	22.0
Argentina	13	12.6	12.3	12.4	13.2	13.1	13.1
China	180.0	210.0	225.0	236.0	262.2	291.0	308.0
Japan	71.5	71.0	71.2	70.5	65.0	65.5	64.2
South Korea	13.8	18.6	18.6	19.0	20.0	20.0	20.0
Philippines	12.4	12.2	12.0	12.0	12.2	12.5	12.5
South Africa	25.7	24.5	24.5	24.0	25.3	25.5	25.5
Australia	17.6	17.2	17.2	17.2	17.3	16.9	16.9
Nigeria	1.1	6.0	6.7	6.8	7.0	8.4	8.5
New Zealand	3.2	3.0	3.0	3.1	3.1	3.1	3.1
All Other Countries	197.0	200.2	226.6	229.4	235.9	243.5	249.7
WORLD TOTALS:	1,344.6	1,395.4	1,420.7	1,439.3	1,496.5	1,545.3	1580.8

SOURCE: Steiner Guidelines for Hop Buying 2005.

*estimate

U.S. HOP EXPORTS 99/00 – 03/04 (Pounds x 1,000)

COUNTRY	'00-'01	'01-'02	'02-'03	'03-'04	'04-'05
Canada	5,914	5,809	5,614	5,856	5,464
Mexico	7,515	7,875	7,042	8,649	7,223
Costa Rica	181	176	131	165	190
El Salvador	35	154	130	29	53
Guatemala	57	152	160	112	181
Honduras	81	0	80	61	75
Nicaragua	12	-	11	24	26
Dominican Republic	2,357	1,324	1,478	1,349	2,051
Jamaica	160	115	74	106	152
Trinidad and Tobago	59	84	30	40	301
Argentina	677	475	363	843	860
Bolivia	38	0	176	121	249
Brazil	6,369	3,511	2,973	3,367	4,278
Chile	159	240	351	886	632
Colombia	1,975	1,739	1,866	2,187	1,284
Ecuador	313	233	448	236	308
Peru	159	115	195	496	1,462
Uruguay	8	4	23	22	3
Venezuela	1,306	2,462	1,260	2,095	1,763
Belgium	5,262	4,784	4,952	8,607	7,946
Denmark	249	2	0	114	108
Finland	70	3	189	200	66
France	550	83	100	365	121
Germany	6,273	4,387	4,287	9,018	3,747
Hungary	0	0	0	105	40
Ireland	1,054	511	349	317	363
Italy	289	254	284	57	88
Netherlands	2,405	1,401	1,747	1,790	1,151
Portugal	143	6	7	2	4
Russia	159	699	404	1,095	867
Spain	65	62	73	25	40
Switzerland	270	213	4	77	44
United Kingdom	3,277	2,980	3,402	4,140	2,956
Nigeria	1,310	1,252	775	1,332	717
South Africa	6	0	67	109	21
China	356	205	664	1,504	2,922
Hong Kong	1,924	1,534	1,702	1,653	1,136
Japan	1,778	1,790	1,092	833	1,162
Korea	1,850	2,129	2,663	1,348	2,578
Malaysia	206	138	243	218	192
Philippines	850	616	747	825	957
Singapore	107	150	120	244	147
Taiwan	1	7	0	0	0
Australia	1,409	1,630	724	1,434	1,152
Sri Lanka	31	0	4	30	44
Thailand	1,270	699	1,700	2,224	1,955
SUB TOTAL	58,585	50,003	48,705	64,310	57,079
ALL OTHERS	2,894	1,773	1,796	2,187	2,071
TOTAL	61,479	51,776	50,501	66,497	59,150

SOURCE: U.S. Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics. Prepared by HGA
Numbers may include minor rounding errors between standard/metric conversions.

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

CONES¹

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Germany	NZ	Poland	U.K.	Other	Total
1995-96	328	0	234	0	278	1,345	7,665	209	237	152	68	10,516
1996-97	340	0	185	0	317	1,378	6,607	2	97	159	119	9,204
1997-98	7	0	203	0	170	1,283	4,652	2	2	112	0	6,431
1998-99	85	44	0	0	130	1,402	6,389	2	0	35	2	8,089
1999-00	2	0	2	0	663	1,774	5,760	31	0	205	11	8,450
2000-01	0	26.7	0	0	69.2	2,313	3,409	1.9	0	97.6	0	5,919
2001-02	0	0	0	-	110	2,159	4,349	4.4	0	136	0	6,810
2002-03	0	0	0	0	50	2,210	3,577	0.6	0	183	0	6,020
2003-04	0	0	0	0	121.6	3,457	3,306	17	0	186.8	29.7	7,118
2004-05	0	0	0	0	80.2	5.5	139.7	3.5	5.5	144	17.6	395

PELLETS

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Germany	NZ	Poland	U.K.	Other	Total
1995-96	0	0	0	42	15	0	1,642	294	0	450	0	2,443
1996-97	0	0	0	0	90	0	2,438	560	0	441	31	3,560
1997-98	181	0	0	0	99	0	2,892	514	0	410	99	4,195
1998-99	202	0	0	0	44	0	1,426	304	0	223	23	2,222
1999-00	220	0	0	0	2	0	1,675	580	20	106	0	2,603
2000-01	1,006	0	0	0	12.3	0	1,296	601	0	163	0	3,090
2001-02	562	0	0	0	69	0	1,402	38	0	240	0	2,316
2002-03	912	0	0	915	43	0	1,923	205	0	166	520*	4,732
2003-04	1,419	0	4	0	132.7	1,110	7,503	826	2	457	5	11,458.7
2004-05	483	0	0	0	80.6	88	7,713	187	6	147	0	8,705

TOTAL EXTRACT - HOP EQUIVALENT X 4

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Germany	NZ	Poland	U.K.	Other	Total
1995-96	0	0	0	0	0	0	133	0	0	17	18	168
1996-97	35	0	0	0	0	0	71	0	0	35	0	141
1997-98	0	0	0	0	0	0	335	0	0	9	0	344
1998-99	0	0	0	0	0	0	6	0	0	105	0	111
1999-00	0	0	0	0	0	0	7	27	0	526	0	560
2000-01	0	7	0	0	0	10	125	18	0	35	1	197
2001-02	0	7	0	0	0	10.6	125	17.6	0	15.8	0.8	177
2002-03	95	322	0	0	0	3.5	271.6	0	0.9	0	0	693
2003-04	0	909	0	0	0	21	288	0	0	2.2	0	1,222
2004-05	95	38	0	8.8	0	4.4	233.6	0	0	143	0	523.2

TOTAL

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Germany	NZ	Poland	U.K.	Other	Total
1995-96	328	0	234	42	293	1,345	9,440	503	237	619	86	13,127
1996-97	375	0	185	0	408	1,378	9,116	562	97	635	150	12,906
1997-98	187	0	203	0	269	1,283	7,879	516	2	531	99	10,970
1998-99	287	44	0	0	174	1,402	7,821	306	0	363	25	10,422
1999-00	222	0	2	0	665	1,774	7,442	638	20	837	11	11,614
2000-01	1007	34	0	0	82	2,324	4,831	621	0	296	1	9,205
2001-02	562.4	7	0	0	179	2,170	5,876	60	0	392	0.8	9,304
2002-03	95	322	0	915	93	2,213	5,772	206	0.9	345	1,451	11,445
2003-04	1,419	910	4	0	254	4,589	11,097	843	2	646	34.7	19,799
2004-05	578.5	38.1	0	8.8	161	98.1	8,086	190	11.7	434	17.6	9,623.8

SOURCE: U.S. Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics. Prepared by HGA
Numbers may include minor rounding errors between standard/metric conversions.

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