

# HOP GROWERS of America



# 2001

## *STATISTICAL REPORT*

PRESENTED: JANUARY 31, 2002  
46<sup>TH</sup> ANNUAL HGA CONVENTION  
GLENEDEN BEACH, OREGON  
UPDATED MARCH 11, 2002

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## Statistical Overview

	1991	2001	Change 91/2001	% Change 91/2001
<b>HOP PRODUCTION (POUNDS)</b>				
United States	69,155,000	68,832,100	-322,900	-0.47%
Germany	80,367,000	68,342,600	-12,024,400	-14.96%
World	287,298,000	216,467,009	-70,830,991	-24.65%
<b>IHGC AROMA ACREAGE</b>				
United States	15,647	10,756	-4,891	-31.26%
Germany	32,360	25,360	-7,000	-21.63%
World	110,146	68,679	-41,467	-37.65%
<b>IHGC ALPHA ACREAGE</b>				
United States	23,941	24,541	600	2.51%
Germany	23,383	18,780	-4,603	-19.69%
World	65,269	68,341	3,072	4.71%
<b>IHGC TOTAL HOP ACREAGE</b>				
United States	39,588	35,891	-3,697	-9.34%
Germany	55,743	46,965	-8,778	-15.75%
World	175,415	144,457	-30,958	-17.65%
<b>U.S. CROP QUALITY (%)</b>				
Leaf & Stem Content	0.65	0.09	-0.56	-86.15%
Seed Content	1.15	1.06	-0.09	-7.83%
<b>ALPHA ACID PRODUCTION (POUNDS)</b>				
United States	6,277,000	7,600,000	1,323,000	21.08%
Germany	5,042,000	5,688,000	646,000	12.81%
World	19,191,000	17,478,000	-1,713,000	-8.93%
<b>ALPHA ACID CONSUMPTION (POUNDS)</b>				
WORLD	17,445,000	17,000,000	-445,000	-2.55%
<b>BEER PRODUCTION (Million HL)</b>				
United States	202.4	231	29	14.13%
World	993.1	1,411	418	42.08%
<b>U.S. HOP EXPORTS (POUNDS)</b>				
Japan	286,598	1,778,000	1,491,402	520.38%
Belgium	1,600,540	5,262,000	3,661,460	228.76%
Germany	5,619,524	6,273,000	653,476	11.63%
Total	31,298,706	61,479,000	30,180,294	96.43%
<b>U.S. HOP IMPORTS (POUNDS)</b>				
Germany	6,792,000	4,831,000	-1,961,000	-28.87%
France	586,000	2,324,000	1,738,000	296.59%
Australia	734,000	1,007,000	273,000	37.19%
Total Imports	18,946,000	9,205,000	-9,741,000	-51.41%

**U.S. HOP PRODUCTION BY STATE AND VARIETY 1997 – 2001**

STATE & VARIETY	HOP PRODUCTION (POUNDS)					% +/-
	1997	1998	1999	2000	2001	
<b>IDAHO</b>						
Chinook	612,000	507,600	383,900	340,000	195,200	-42.6%
Cluster	1,566,900	886,300	694,600	384,700	363,400	-5.5%
Galena	1,050,000	895,700	1,049,300	971,000	823,500	-15.2%
Horizon	1/	1/	7,000	1/	1/	N/A
Mt. Hood	17,500	15,000	22,900	106,000	38,400	-63.8%
Nugget	72,300	131,900	152,500	136,000	81,000	-40.4%
Willamette	150,400	160,700	333,000	297,600	231,500	-22.2%
Zeus	1/	2,000	397,100	824,500	893,000	8.3%
Other Varieties	1,876,600	1,932,200	1,693,700	1,870,000	1,983,300	6.1%
<b>Total Idaho</b>	<b>5,484,100</b>	<b>4,531,400</b>	<b>4,734,000</b>	<b>4,929,800</b>	<b>4,609,300</b>	<b>-6.5%</b>
<b>OREGON</b>						
Fuggle	391,300	206,600	105,400	67,100	2/	N/A
Golding	230,300	198,900	153,500	134,600	2/	N/A
Millennium	1/	1/	1/	1/	300,700	N/A
Mt. Hood	391,500	339,700	461,700	447,500	506,300	13.1%
Nugget	6,570,100	4,875,200	4,822,700	4,989,500	5,545,300	11.1%
Perle	462,200	502,800	542,000	454,300	665,300	46.4%
Santiam	1/	1/	1/	22,500	2/	N/A
Sterling	1/	1/	1/	105,700	187,900	77.8%
Willamette	4,505,100	3,473,200	3,284,200	3,318,000	3,463,600	4.4%
Other Varieties	443,900	449,700	594,700	847,800	774,100	-8.7%
<b>Total Oregon</b>	<b>13,572,000</b>	<b>10,227,400</b>	<b>10,072,000</b>	<b>10,387,000</b>	<b>11,443,200</b>	<b>10.2%</b>
<b>WASHINGTON</b>						
Cascade	2,032,500	1,785,600	1,821,100	1,798,800	1,790,400	-0.5%
Chelan	2/	2/	2/	2/	573,500	N/A
Chinook	3,079,400	1,570,900	1,582,000	1,311,200	918,600	-29.9%
Cluster	6,815,000	4,975,600	2,536,300	1,875,200	1,045,600	-44.2%
Columbus/Tomahawk	2/	9,956,500	10,628,800	11,778,000	12,253,100	4.0%
Galena	12,736,800	9,824,300	10,615,800	9,538,200	7,345,600	-23.0%
Golding	220,600	89,600	51,500	39,500	55,400	40.3%
Hallertauer	1/	1/	2/	2/	73,600	
Horizon	1/	97,500	332,300	395,000	414,900	5.0%
Magnum	1/	1/	148,500	118,000	59,800	-49.3%
Millennium	1/	1/	1/	2/	2,815,100	N/A
Mt. Hood	712,800	371,800	426,200	420,900	376,300	-10.6%
Nugget	11,258,600	7,237,400	8,683,700	8,522,200	8,086,500	-5.1%
Perle	330,200	186,500	292,100	215,900	226,300	4.8%
Tettnanger	1,923,700	226,800	129,000	2/	63,500	N/A
Tillicum	2/	2/	2/	2/	677,500	N/A
Vanguard	2/	2/	2/	2/	74,100	N/A
Willamette	6,488,500	4,628,000	4,844,200	4,888,400	4,674,400	-4.4%
YCR5 (Warrior TM)	2/	2/	2/	2/	2,670,100	N/A
Zeus	2/	2/	3,480,800	5,381,800	5,834,400	8.4%
Other Varieties:						
High Alpha	7,100,000	2,221,000	1,865,500	3,997,600	138,824	-96.5%
Alpha	483,000	411,600	240,800	165,000	142,987	-13.3%
Aroma	310,400	220,000	222,000	374,000	224,542	-40.0%
Other	2,075,000	780,000	1,748,400	1,439,700	119,924	-91.7%
<b>Total Washington</b>	<b>55,816,000</b>	<b>44,791,000</b>	<b>49,649,000</b>	<b>52,260,000</b>	<b>50,779,600</b>	<b>-2.8%</b>
<b>Total United States</b>	<b>74,892,100</b>	<b>59,549,800</b>	<b>64,455,000</b>	<b>67,576,800</b>	<b>66,832,100</b>	<b>-1.1%</b>

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. Washington N. Brewer omitted at 124,500 pounds.

**U.S. HOP ACREAGE BY STATE AND VARIETY 1997 – 2001**

STATE & VARIETY	ACRES HARVESTED					% +/-
	1997	1998	1999	2000	2001	
<b>IDAHO</b>						
Chinook	342	384	202	170	120	-29.4%
Cluster	797	657	417	198	234	18.2%
Galena	666	733	625	535	552	3.2%
Horizon	1/	1/	7	1/	1/	N/A
Mt. Hood	10	10	32	53	32	-39.6%
Nugget	65	97	89	68	54	-20.6%
Willamette	211	225	248	194	215	10.8%
Zeus	1/	1/	201	403	477	18.4%
Other Varieties	1,706	1,803	1,541	1,700	1,785	5.0%
<b>Total Idaho</b>	<b>3,870</b>	<b>3,909</b>	<b>3,362</b>	<b>3,321</b>	<b>3,469</b>	<b>4.5%</b>
<b>OREGON</b>						
Fuggle	423	189	98	63	2/	N/A
Golding	245	235	110	115	2/	N/A
Millennium	1/	1/	1/	1/	117	N/A
Mt. Hood	238	225	253	250	257	2.8%
Nugget	3,063	2,415	2,153	2,308	2,268	-1.7%
Perle	329	385	406	402	491	22.1%
Santiam	1/	1/	1/	17	2/	N/A
Sterling	1/	1/	1/	62	91	46.8%
Willamette	3,070	2,290	2,321	2,142	2,434	13.6%
Other Varieties	335	268	393	460	445	-3.3%
<b>Total Oregon</b>	<b>8,352</b>	<b>6,161</b>	<b>5,822</b>	<b>5,819</b>	<b>6,103</b>	<b>4.9%</b>
<b>WASHINGTON</b>						
Cascade	1,037	992	906	996	1,003	0.7%
Chelan	2/	2/	2/	2/	317	N/A
Chinook	1,692	1,007	791	670	535	-20.1%
Cluster	3,625	2,605	1,321	939	534	-43.1%
Columbus/Tomahawk	1/	3,999	4,374	4,594	4,915	7.0%
Galena	6,960	5,779	5,282	5,044	4,375	-13.3%
Golding	161	83	35	36	45	25.0%
Hallertauer	1/	1/	2/	2/	76	N/A
Horizon	1/	130	268	316	339	7.3%
Magnum	1/	1/	99	73	42	-42.5%
Millennium	1/	1/	1/	2/	1,382	N/A
Mt. Hood	540	361	384	367	333	-9.3%
Nugget	5,492	4,793	4,195	4,597	4,109	-10.6%
Perle	256	296	273	275	209	-24.0%
Tettnanger	1,564	252	129	-	60	N/A
Tillicum	2/	2/	2/	2/	369	N/A
Vanguard	2/	2/	2/	2/	54	N/A
Willamette	4,297	3,922	3,364	3,563	3,571	0.2%
YCR5 (Warrior TM)	2/	2/	2/	2/	1,370	N/A
Zeus	1/	1/	1,520	1,994	2,186	9.6%
Other Varieties:						
High Alpha	3,594	1,116	911	2,257	67	-97.0%
Alpha	334	292	137	106	90	-15.1%
Aroma	209	251	206	330	163	-50.6%
Other	1,193	569	881	824	98	-88.1%
<b>Total Washington</b>	<b>31,080</b>	<b>26,573</b>	<b>25,076</b>	<b>26,980</b>	<b>26,339</b>	<b>-2.4%</b>
<b>Total United States</b>	<b>43,302</b>	<b>36,643</b>	<b>34,260</b>	<b>36,120</b>	<b>35,911</b>	<b>-0.6%</b>

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. Washington N. Brewer omitted at 97 acres.

**U.S. HOP YIELDS BY STATE AND VARIETY 1997 – 2001**

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					% +/-
	1997	1998	1999	2000	2001	
<b>IDAHO</b>						
Chinook	1,789	1,322	1,900	2,000	1,627	-18.7%
Cluster	1,966	1,349	1,666	1,943	1,553	-20.1%
Galena	1,577	1,222	1,679	1,815	1,492	-17.8%
Horizon	1/	1/	1,000	1/	1/	N/A
Mt. Hood	1,750	1,500	716	2,000	1,200	-40.0%
Nugget	1,112	1,360	1,713	2,000	1,500	-25.0%
Willamette	713	714	1,343	1,534	1,077	-29.8%
Zeus				2,046	1,872	-8.5%
Other Varieties	1,100	1,072	1,099	1,100	1,111	1.0%
<b>Total Idaho</b>	<b>1,487</b>	<b>1,220</b>	<b>1,408</b>	<b>1,484</b>	<b>1,329</b>	<b>-10.4%</b>
<b>OREGON</b>						
Fuggle	925	1,093	1,076	1,065	2/	N/A
Golding	940	846	1,395	1,170	2/	N/A
Millennium	1/	1/	1/	1/	2,570	N/A
Mt. Hood	1,645	1,510	1,825	1,790	1,970	10.1%
Nugget	2,145	2,019	2,240	2,162	2,445	13.1%
Perle	1,405	1,306	1,335	1,130	1,355	19.9%
Santiam	1/	1/	1/	1,324	2/	N/A
Sterling	1/	1/	1/	1,705	2,065	21.1%
Willamette	1,467	1,517	1,415	1,549	1,423	-8.1%
Other Varieties	1,325	1,678	1,513	1,843	1,740	-5.6%
<b>Total Oregon</b>	<b>1,343</b>	<b>1,393</b>	<b>1,730</b>	<b>1,785</b>	<b>1,875</b>	<b>5.0%</b>
<b>WASHINGTON</b>						
Cascade	1,960	1,800	2,010	1,806	1,785	-1.2%
Chelan	2/	2/	2/	2/	1,809	N/A
Chinook	1,820	1,560	2,000	1,957	1,717	-12.3%
Cluster	1,880	1,910	1,920	1,997	1,958	-2.0%
Columbus/Tomahawk	-	2,490	2,430	2,564	2,493	-2.8%
Galena	1,830	1,700	2,010	1,891	1,679	-11.2%
Golding	1,370	1,080	1,470	1,098	1,231	12.1%
Hallertauer	1/	1/	2/	2/	968	N/A
Horizon	1/	1/	1,240	1,250	1,224	-2.1%
Magnum	1/	1/	1,500	1,616	1,424	-11.9%
Millennium	1/	1/	2/	2/	2,037	N/A
Mt. Hood	1,320	1,030	1,100	1,147	1,130	-1.5%
Nugget	2,050	1,510	2,070	1,854	1,968	6.1%
Perle	1,290	630	1,070	785	1,083	38.0%
Tettnanger	1,230	900	1,000	-	1,058	N/A
Tillicum	1/	1/	2/	2/	1,836	N/A
Vanguard	1/	1/	2/	2/	1,372	N/A
Willamette	1,510	1,180	1,440	1,372	1,309	-4.6%
YCR5 (Warrior TM)	1/	1/	2/	2/	1,949	N/A
Zeus	1/	1/	2,290	2,699	2,669	-1.1%
Other Varieties:						
High Alpha	1,976	1,990	2,048	1,772	2,072	16.9%
Alpha	1,446	1,410	1,758	1,557	1,589	2.1%
Aroma	1,485	876	1,078	1,134	1,378	21.5%
Other	1,739	1,371	1,985	1,748	1,224	-30.0%
<b>Total Washington</b>	<b>1,659</b>	<b>1,402</b>	<b>1,980</b>	<b>1,937</b>	<b>1,928</b>	<b>-0.5%</b>
<b>Total United States</b>	<b>1,497</b>	<b>1,338</b>	<b>1,884</b>	<b>1,871</b>	<b>1,861</b>	<b>-0.5%</b>

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. Washington N. Brewer omitted at 1,284 pounds per acre.

**U.S. HOP ACREAGE TRENDS ALPHA & AROMA VARIETIES 1997–2001  
(IN ACRES)**

ALPHA VARIETIES	1997	1998	1999	2000	2001	% +/-
Nugget	8,620	7,305	6,437	6,973	6,431	-7.8%
Galena	7,626	6,512	5,907	5,579	4,927	-11.7%
Columbus/Tomahawk	2/	3,999	4,374	4,594	4,915	7.0%
Zeus	2/	2/	1,721	2,397	2,663	11.1%
Millennium	2/	2/	2/	2/	1,499	N/A
YCR5 (Warrior TM)	2/	2/	2/	2/	1,370	N/A
Cluster	4,422	3,262	1,738	1,137	768	-32.5%
Chinook	2,034	1,391	993	840	655	-22.0%
Tillicum	2/	2/	2/	2/	369	N/A
Chelan	2/	2/	2/	2/	317	N/A
Magnum	2/	2/	2/	2/	42	N/A
Other Varieties:						
High Alpha Hops	3,594	1,116	911	2,257	67	-97.0%
Alpha Hops	334	292	137	106	90	-15.1%
Other	647	528	881	824	98	-88.1%
<b>TOTAL</b>	<b>27,403</b>	<b>24,531</b>	<b>22,869</b>	<b>24,707</b>	<b>24,211</b>	<b>-3.3%</b>
<b>TOTAL U.S.</b>	<b>43,302</b>	<b>36,643</b>	<b>34,260</b>	<b>36,120</b>	<b>35,911</b>	<b>-0.6%</b>
<b>% of TOTAL</b>	<b>63%</b>	<b>67%</b>	<b>67%</b>	<b>68%</b>	<b>67%</b>	<b>-1%</b>

AROMA VARIETIES	1997	1998	1999	2000	2001	% +/-
Willamette	7,578	6,437	5,933	5,899	6,220	5.4%
Cascade	1,037	992	906	996	1,003	0.7%
Perle	585	681	679	677	700	3.4%
Mt. Hood	788	596	669	670	622	-7.2%
Horizon	2/	130	275	316	339	7.3%
Sterling	2/	2/	2/	62	91	46.8%
Hallertauer	2/	2/	2/	2/	76	N/A
Golding	406	318	145	151	45	-70.2%
Other	2,796	2,363	2,469	2,490	2,604	4.5%
<b>TOTAL</b>	<b>15,899</b>	<b>12,112</b>	<b>11,391</b>	<b>11,341</b>	<b>11,700</b>	<b>3.2%</b>
<b>TOTAL U.S.</b>	<b>43,302</b>	<b>36,643</b>	<b>34,260</b>	<b>36,120</b>	<b>35,911</b>	<b>-0.6%</b>
<b>% of TOTAL</b>	<b>37%</b>	<b>33%</b>	<b>33%</b>	<b>31%</b>	<b>32%</b>	<b>1%</b>

SOURCE: USDA. Prepared by HGA

**U.S. HOP ACREAGE BY STATE 1991 – 2001 (IN ACRES)**

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
1991	28,245	7,190	4,118	39,553
1992	30,366	7,900	4,000	42,266
1993	31,239	7,900	3,961	43,100
1994	30,375	8,000	4,037	42,412
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

SOURCE: USDA. Prepared by HGA



**U.S. AVERAGE HOP YIELDS 1991 - 2001**

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL U.S.
1991	1,896	1,415	1,319	1,748
1992	1,881	1,479	1,387	1,759
1993	1,884	1,500	1,375	1,767
1994	1,800	1,715	1,527	1,758
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

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) -----						
1981	\$1.50	\$1.47	\$1.65	\$1.51	79,144	\$119,220
1982	\$1.60	\$1.97	\$2.48	\$1.74	78,550	\$136,884
1983	\$1.80	\$2.15	\$2.62	\$1.93	68,111	\$131,483
1984	\$1.99	\$2.10	\$2.92	\$2.10	56,167	\$117,701
1985	\$1.80	\$2.36	\$3.18	\$2.03	49,713	\$98,433
1986	\$1.59	\$2.08	\$2.59	\$1.78	49,062	\$87,087
1987	\$1.32	\$1.78	\$2.74	\$1.51	50,048	\$75,578
1988	\$1.36	\$1.64	\$1.09	\$1.40	54,696	\$76,415
1989	\$1.33	\$1.58	\$1.26	\$1.38	59,326	\$81,583
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	\$126,636
2001	\$1.83	\$2.41	\$1.61	\$1.91	66,832	\$127,926

SOURCE: USDA. Prepared by HGA

## 2001 HOP INSPECTION REPORT

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

YEAR	WASHINGTON (%)	OREGON (%)	IDAHO (%)	TOTAL (%)
1997	276,311 (0.52)	68,722 (0.64)	27,238 (0.66)	372,271 (0.55)
1998	215,726 (0.11)	51,739 (0.21)	21,217 (0.09)	288,682 (0.12)
1999	235,356 (0.06)	50,281 (0.21)	21,729 (0.05)	307,366 (0.08)
2000	249,607 (0.11)	52,163 (0.23)	22,851 (0.01)	324,621 (0.12)
2001	250,454 (0.08)	57,321 (0.14)	22,568 (0.04)	330,343 (0.09)

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

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	231,948	16,643	1,649	61	153	-	-	-	250,454
OR	50,604	5,522	1,009	186	-	-	-	-	57,321
ID	21,576	992	-	-	-	-	-	-	22,568
Total	304,128	23,157	2,658	247	153	-	-	-	330,343
% of Total	92	7	1	-	-	-	-	-	100

TABLE 3. Number of Bales in Each Seed Category

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	144,798	49,312	23,694	13,368	6,360	6,121	4,278	2,523	250,454
OR	20,998	10,135	8,607	4,570	4,049	4,329	1,567	3,066	57,321
ID	22,357	211	-	-	-	-	-	-	22,568
Total	188,153	59,658	32,301	17,938	10,409	10,450	5,845	5,589	330,343
% of Total	57	18	10	5	3	3	2	2	100

SOURCE: USDA. GIPSA. Federal Grain Inspection Service

## U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE 1991 – 2001

Year	WASHINGTON	OREGON	IDAHO	U.S. AVERAGE	
	Leaf & Stem	Leaf & Stem	Leaf & Stem	Leaf & Stem	Seed Content
1991	0.78	1.39	0.35	0.85	1.15
1992	0.96	1.62	1.02	0.93	0.67
1993	0.71	1.16	0.87	0.79	0.91
1994	0.62	1.12	0.99	0.75	0.54
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

SOURCE: USDA Federal Grain Inspection Service. Prepared by HGA

***IHGC AROMA ACREAGE 1997 – 2001***

COUNTRY	AROMA ACREAGE (IN ACRES)					2001 % +/-
	1997	1998	1999	2000	2001	
Australia	222	148	10	9	7	-22.2%
Belgium	230	217	199	185	126	-31.9%
Bulgaria	259	259	N/A	222	222	0.0%
China	No Data	No Data	237	237	464	95.8%
Czech Rep.	17,373	14,321	14,614	14,693	13,825	-5.9%
Germany	31,788	29,205	26,202	25,612	25,360	-1.0%
France	1,548	1,733	1,802	1,809	1,837	1.5%
New Zealand	262	346	387	429	452	5.4%
Poland	4,642	3,654	3703	3,580	3,333	-6.9%
Portugal	0	0	0	0	0	N/A
Russia	3,400	2,494	3,111	2,681	1,741	-35.1%
Slovakia	1,975	1,111	864	864	864	0.0%
Slovenia	5,035	4,649	4,214	4,138	3,857	-6.8%
Spain	0	0	0	0	0	N/A
UK - England	4,353	3,835	3,246	2,797	2,896	3.5%
Ukraine	4,444	4,049	2,380	2,370	2,617	10.4%
USA	15,886	12,015	10,928	10,807	10,756	-0.5%
Yugoslavia	449	449	449	321	321	0.0%
South Africa	No Data	No Data	0	0	0	N/A
Austria	No Data	No Data	No Data	No Data	0	N/A
IHGC Total	91,866	78,485	72,346	70,754	68,679	-2.9%

SOURCE: IHGC November 2001 Report

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

***IHGC ALPHA ACREAGE 1997 – 2001***

COUNTRY	ALPHA ACREAGE (IN ACRES)					2001 % +/-
	1997	1998	1999	2000	2001	
Australia	2,378	1,447	2,069	1,997	1,923	-3.7%
Belgium	523	435	428	427	457	7.0%
Bulgaria	691	691	N/A	641	679	5.9%
China	No Data	No Data	10,133	10,592	11,160	5.4%
Czech Rep.	0	99	177	355	417	17.5%
Germany	17,067	17,163	17,459	17,995	18,780	4.4%
France	156	128	133	125	123	-1.6%
New Zealand	612	516	501	511	521	2.0%
Poland	1,481	1,481	1,728	1,851	2,099	13.4%
Portugal	0	0	158	103	94	-8.7%
Russia	790	790	938	1,079	778	-27.9%
Slovakia	0	0	0	0	0	N/A
Slovenia	222	123	74	172	235	36.6%
Spain	1,279	2,040	1,962	1,906	1,906	0.0%
UK - England	2,153	1,570	2,054	1,859	1,790	-3.7%
Ukraine	741	889	647	740	840	13.5%
USA	27,383	24,326	23,330	25,597	24,541	-4.1%
Yugoslavia	993	993	990	792	793	0.1%
South Africa	No Data	No Data	1,214	1,172	1,205	2.8%
Austria	No Data	No Data	No Data	No Data	0	N/A
IHGC Total	56,469	52,691	63,995	67,914	68,341	0.6%

SOURCE: IHGC November 2001 Report

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

**IHGC TOTAL ACREAGE 1997 – 2001**

COUNTRY	TOTAL ACREAGE (IN ACRES)					2001
	1997	1998	1999	2000	2001	% +/-
Australia	2,600	1,595	2,079	2,007	1,931	-3.8%
Belgium	827	652	627	612	602	-1.6%
Bulgaria	951	951	741	864	938	8.6%
China	No Data	No Data	10,370	10,829	11,884	9.7%
Czech Rep.	18,435	15,215	15,735	15,839	15,000	-5.3%
Germany	52,790	46,376	45,181	45,915	46,965	2.3%
France	1,916	1,968	2,012	2,011	2,015	0.2%
New Zealand	874	862	888	940	973	3.5%
Poland	6,123	5,136	5,432	5,432	5,556	2.3%
Portugal	0	0	158	103	94	-8.7%
Russia	4,190	3,304	4,152	3,918	2,716	-30.7%
Slovakia	1,975	1,111	864	864	864	0.0%
Slovenia	5,257	4,958	4,500	4,614	4,462	-3.3%
Spain	2,081	2,040	2,085	2,029	1,906	-6.1%
UK - England	7,099	5,640	5,301	4,828	5,035	4.3%
Ukraine	5,432	5,309	3,293	4,098	4,642	13.3%
USA	43,269	36,341	34,260	36,404	35,891	-1.4%
Yugoslavia	1,442	1,442	1,439	1,137	1,185	4.2%
South Africa	No Data	No Data	1,214	1,172	1,235	5.4%
Austria	No Data	No Data	No Data	No Data	563	N/A
<b>IHGC Total</b>	<b>155,261</b>	<b>132,900</b>	<b>140,331</b>	<b>143,616</b>	<b>144,457</b>	<b>0.6%</b>

SOURCE: IHGC November 2001, 2000, 1999, 1998, 1997 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.

**2001 WORLD HOP ACREAGE AND PRODUCTION**

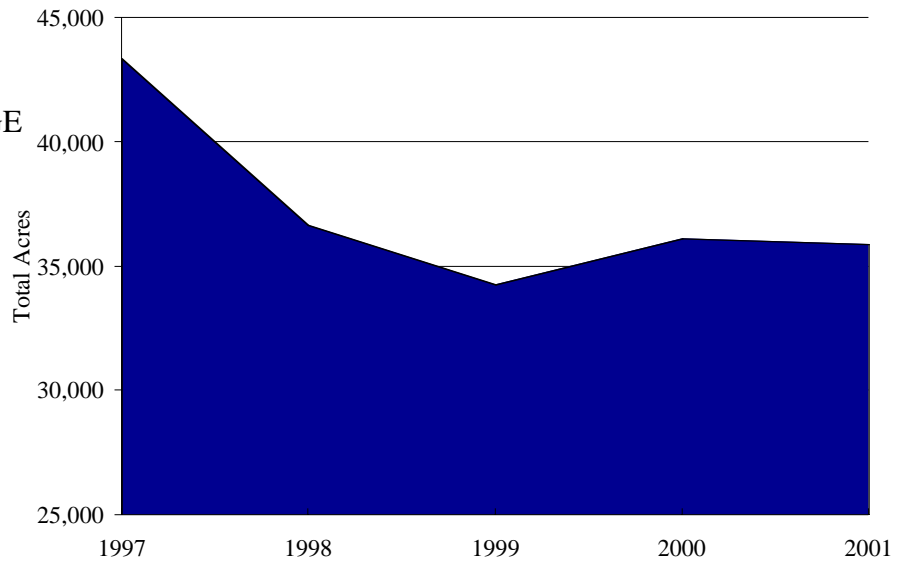
COUNTRY	HOP ACREAGE				HOP PRODUCTION			
	AROMA	ALPHA	TOTAL	NEW	AROMA	ALPHA	TOTAL	Alpha MT.
Australia	7	1,923	1,931	0	7,716	4,800,296	4,808,012	281
Belgium	126	457	602	20	165,345	794,758	960,103	44
Bulgaria	222	679	938	37	163,140	511,467	674,608	31
China	464	11,160	11,884	259	839,291	28,946,398	29,785,689	907
Czech Rep.	13,825	417	15,000	758	13,115,165	892,863	14,008,028	256
Germany	25,360	18,780	46,965	2,825	37,478,200	30,864,400	68,342,600	2,580
France	1,837	123	2,015	54	2,464,522	207,453	2,671,975	30
New Zealand	452	521	973	0	648,373	949,080	1,597,453	88
Poland	3,333	2,099	5,556	123	2,645,520	2,204,600	4,850,120	122
Portugal	0	94	94	0	0	88,184	88,184	4
Russia	1,741	778	2,716	198	613,540	400,576	1,014,116	22
Slovakia	864	0	864	0	661,380	0	661,380	11
Slovenia	3,857	235	4,462	370	3,968,280	330,690	4,298,970	141
Spain	0	1,906	1,906	0	0	3,114,549	3,114,549	150
UK - England	2,896	1,790	5,035	348	3,288,381	2,730,397	6,018,778	226
Ukraine	2,617	840	4,642	1,185	1,763,680	661,380	2,425,060	56
USA	10,756	24,541	35,891	595	129,503,72	53,053,699	66,004,071	3,450
Yugoslavia	321	793	1,185	72	525,797	1,344,586	1,870,383	52
South Africa	0	1,205	1,235	30	0	1,708,565	1,708,565	90
Austria	0	0	563	0	0	0	736,336	0
<b>2001 IHGC Totals</b>	<b>68,679</b>	<b>68,341</b>	<b>144,457</b>	<b>6,874</b>	<b>81,298,704</b>	<b>133,603,941</b>	<b>215,638,981</b>	<b>8,540</b>
<b>2000 IHGC Totals</b>	<b>70,573</b>	<b>66,951</b>	<b>143,353</b>	<b>5,830</b>	<b>79,687,692</b>	<b>130,856,679</b>	<b>210,544,371</b>	<b>8,360*</b>

SOURCE: November 2001 IHGC Report

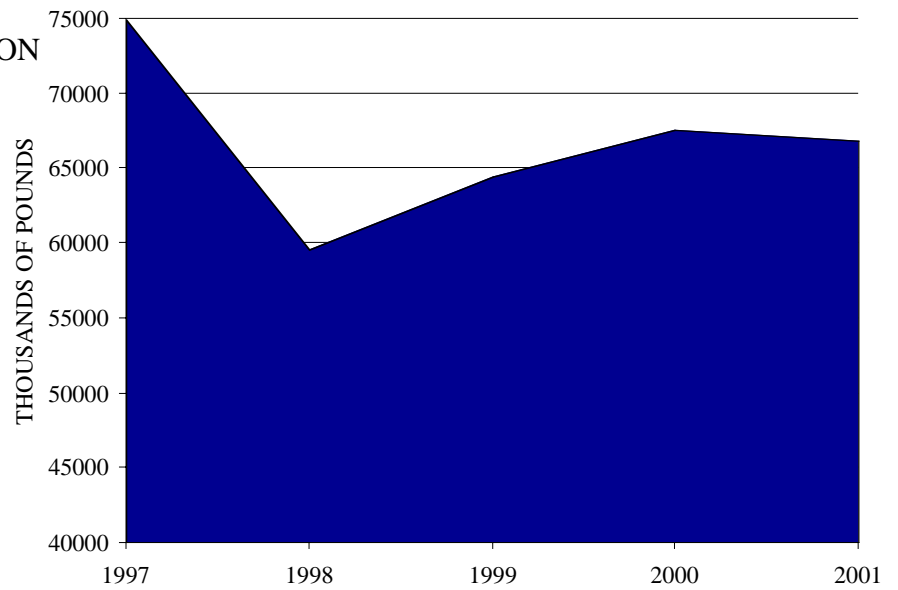
\*Includes approximately 270 metric tons of alpha acid destroyed by fire in Yakima.

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

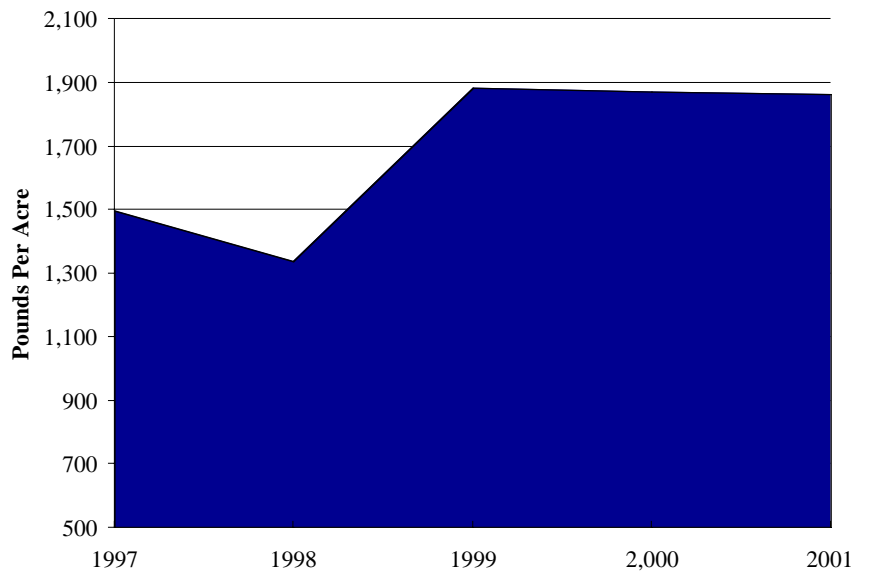
U.S. TOTAL ACREAGE  
1997 - 2001



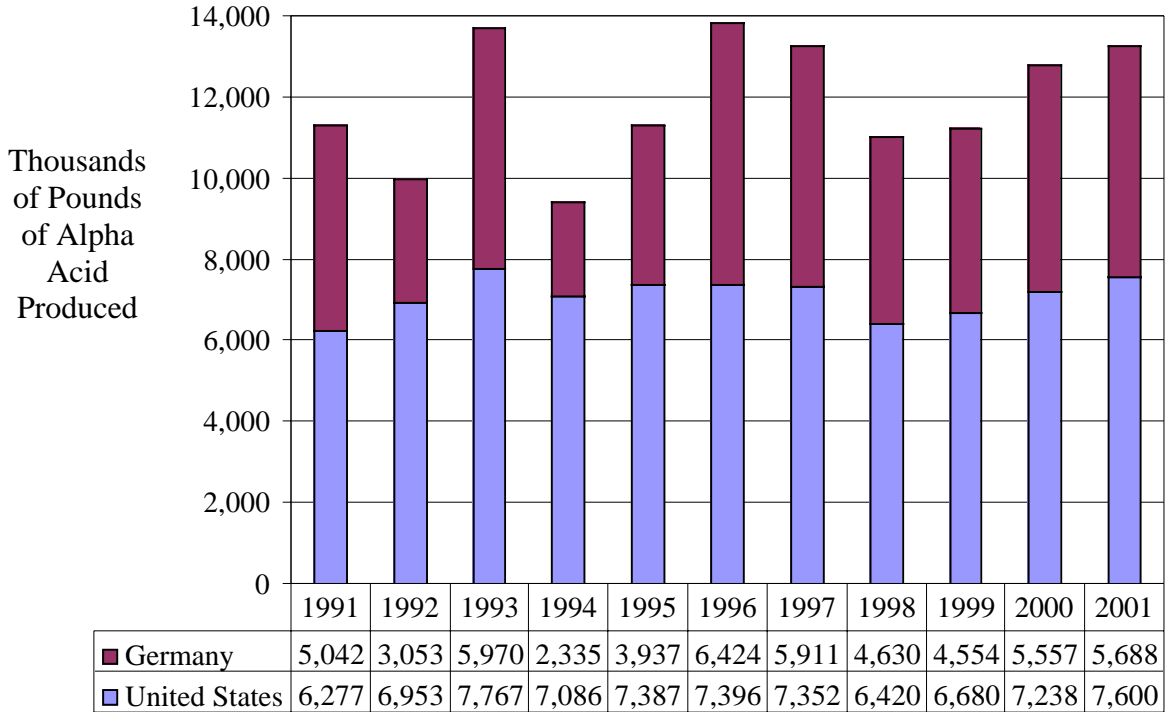
U.S. TOTAL PRODUCTION  
1997 - 2001



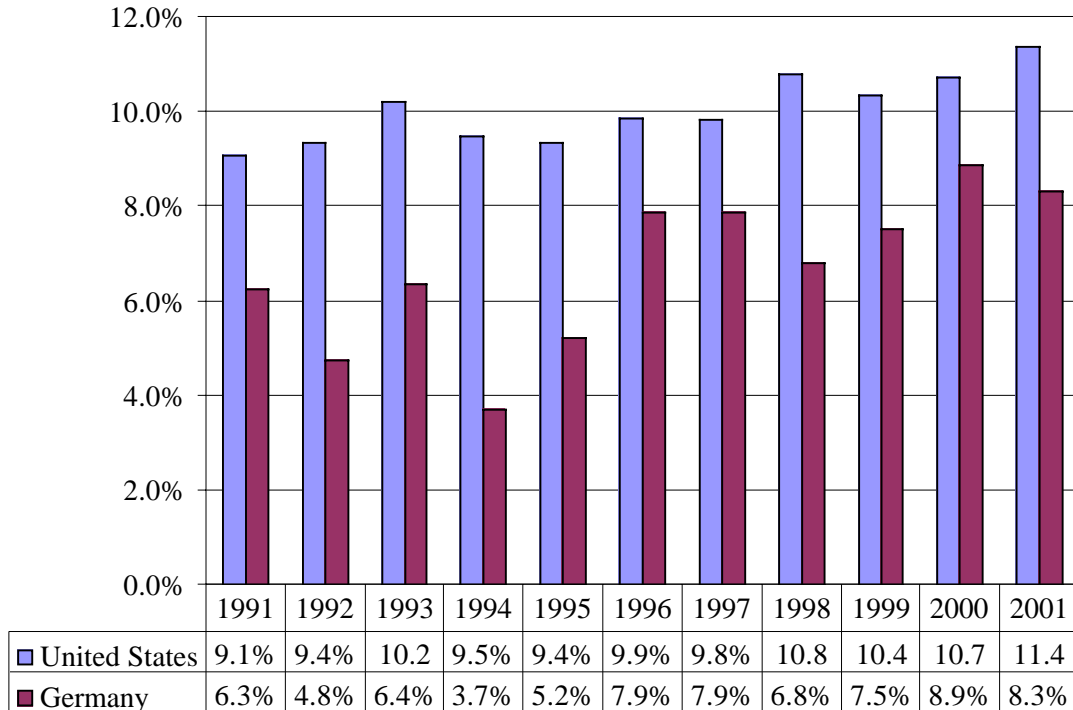
U.S. AVERAGE YIELD  
PER ACRE 1997 - 2001



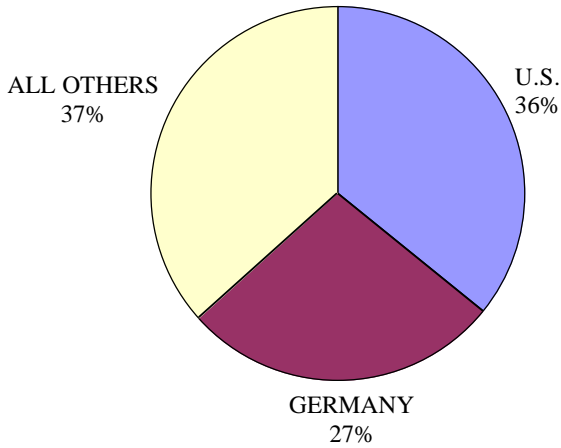
U.S. and German Alpha Acid Production 1991 - 2001



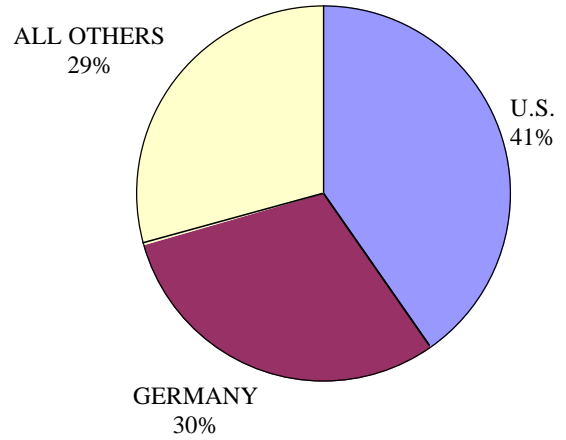
U.S. and German Average Alpha Acid Percentage 1991 - 2001



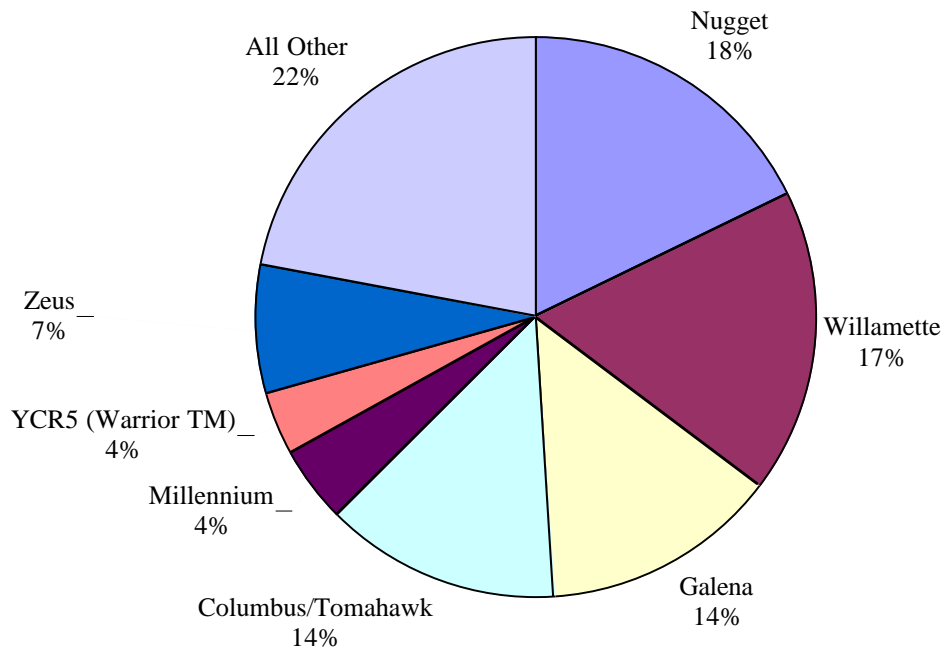
U.S. & GERMAN 2001 ALPHA ACREAGE & THE % OF WORLD ALPHA ACREAGE THEY REPRESENT



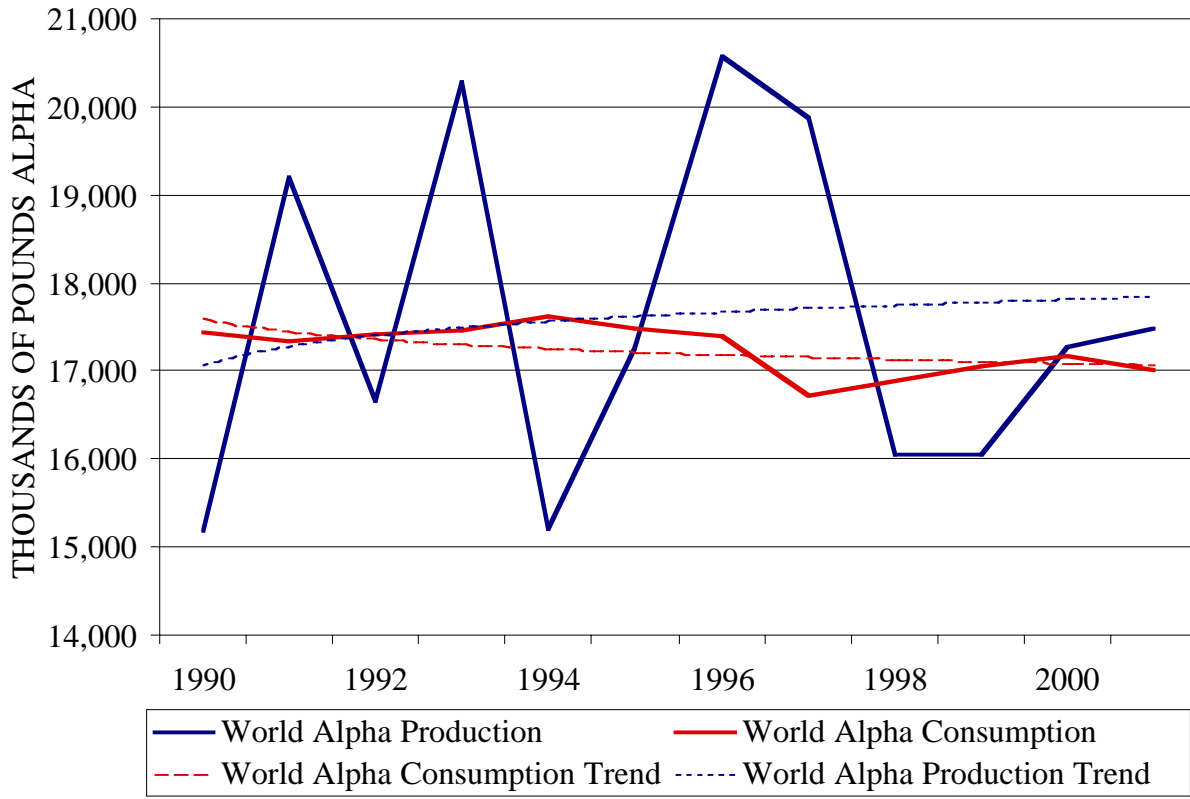
U.S. & GERMAN 2001 ALPHA PRODUCTION & THE % OF WORLD ALPHA PRODUCTION THEY REPRESENT



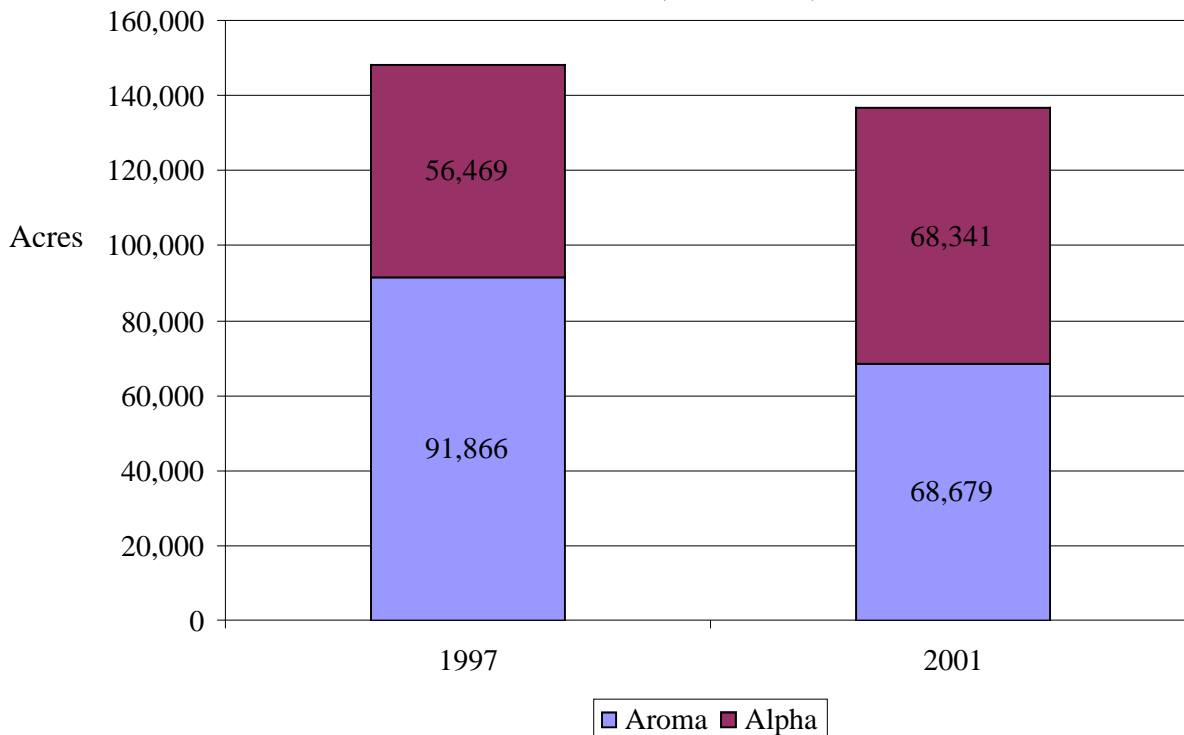
TOP 7 VARIETIES PRODUCED IN THE U.S. AND THE % OF THE CROP THEY REPRESENT



WORLD ALPHA PRODUCTION TREND VERSUS  
WORLD ALPHA CONSUMPTION TREND 1990-2001



COMPOSITION OF WORLD HOP ACREAGE  
1997 VERSUS 2001 (IN ACRES)





**IHGC SOLD AHEAD SURVEY 2001 – 2005**

COUNTRY	2001 Production (Pounds)	(Pounds contracted, % based on 2001 production)			
		2002	2003	2004	2005
Australia	4,808,012	0	0	0	0
Belgium	960,103	141,094	135,583	110,230	110,230
Bulgaria	674,608	0	0	0	0
China	29,785,689	0	0	0	0
Czech Rep.	14,008,028	13,778,750	13,227,600	13,227,600	11,023,000
Germany	68,342,600	42,548,780	36,155,440	27,006,350	21,494,850
France	2,671,975	2,356,717	2,676,384	419,646	0
New Zealand	1,597,453	1,543,220	1,490,310	1,426,376	1,172,847
Poland	4,850,120	0	0	0	0
Portugal	88,184	0	0	0	0
Russia	1,014,116	771,610	0	0	0
Slovakia	661,380	661,380	661,380	0	0
Slovenia	4,298,970	2,579,382	2,149,485	1,719,588	429,897
Spain	3,114,549	0	0	0	0
UK - England	6,018,778	2,976,210	2,204,600	1,212,530	440,920
Ukraine	2,425,060	0	0	0	0
USA*	66,832,100	30,004,496	23,357,737	16,456,126	2,709,674
Yugoslavia	1,870,383	0	0	0	0
South Africa	1,708,565	0	0	0	0
Austria	736,336	0	0	0	0
<b>TOTAL IHGC</b>	<b>216,467,009</b>	<b>97,361,639</b>	<b>82,058,519</b>	<b>61,578,446</b>	<b>37,381,418</b>
<b>IHGC Contracted</b>		<b>45.2%</b>	<b>38.1%</b>	<b>28.6%</b>	<b>17.3%</b>

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 2001, U.S. production estimate updated to reflect actuals.

**U.S. ADJUSTED SOLD AHEAD SURVEY RESULTS 1997 - 2001**

REPORT YEAR (N)	REPORT YEAR PRODUCTION	Percent Sold Ahead Based on Report Year Production				
		(N)	(N+1)	(N+2)	(N+3)	(N+4)
1997	74,892,100	89%	80%	58%	47%	15%
1998	59,549,800	122%	84%	70%	40%	13%
1999	64,455,000	81%	63%	42%	32%	10%
2000	67,576,800	90%	64%	43%	32%	12%
2001	66,832,100	72%	45%	35%	25%	4%

- The U.S. Sold Ahead survey is issued using crop production figures from the previous year (N-1). In hindsight, 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	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Germany	56,680 24%	56,875 25%	54,189 25%	54,078 25%	53,897 26%	52,830 30%	48,638 33%	45,177 32%	45,915 32%	46,965 33%
England	8,431 4%	8,332 4%	7,863 4%	7,781 4%	7,843 4%	7,764 4%	6,047 4%	5,636 4%	4,828 3%	5,035 3%
Czech/Slovak	28,664 12%	28,663 12%	28,169 13%	27,601 13%	25,587 13%	20,411 12%	15,091 10%	15,842 11%	16,703 12%	15,864 11%
Europe (rest)	65,696 28%	57,948 25%	52,541 24%	48,674 23%	41,500 20%	32,447 18%	25,840 17%	24,844 17%	25,682 18%	24,679 17%
USA	42,266 18%	43,100 19%	42,412 19%	43,189 20%	44,161 22%	43,301 24%	36,673 25%	34,260 24%	36,404 25%	35,891 25%
China	19,700 8%	19,800 9%	19,800 9%	17,300 8%	16,300 8%	12,355 7%	10,556 7%	10,556 7%	10,829 7%	11,884 8%
World (rest)	14,630 6%	14,977 7%	14,677 7%	14,557 7%	14,250 7%	7,645 4%	6,577 4%	6,530 5%	3,255 2%	4,139 3%
World Totals	236,067	229,695	219,651	213,180	203,538	176,753	149,422	142,845	143,616	144,457

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

COUNTRY	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Germany	64,239 24%	93,626 31%	62,687 24%	75,224 27%	81,571 29%	74,957 30%	68,166 33%	60,462 29%	62,709 30%	68,343 32%
England	11,084 4%	12,364 4%	10,709 4%	9,106 3%	11,250 4%	9,433 4%	7,209 3%	6,945 3%	6,082 3%	6,019 3%
Czech/Slovak	20,393 8%	23,243 8%	22,642 9%	24,136 9%	24,141 9%	18,105 7%	11,751 6%	14,771 7%	10,815 5.1%	14,669 7%
Europe (rest)	51,572 19%	49,564 16%	40,258 15%	41,235 15%	35,819 13%	29,533 12%	24,857 12%	25,904 13%	23,174 11%	22,704 11%
USA	74,337 28%	76,144 25%	74,560 28%	78,852 28%	74,971 27%	74,872 30%	59,548 29%	64,455 31%	67,576 32%	66,832 31%
China	26,455 10%	29,762 10%	38,500 15%	35,275 13%	35,274 13%	26,786 11%	26,581 13%	26,455 13%	33,152 15%	29,786 14%
World (rest)	20,598 8%	19,865 7%	12,700 5%	17,762 6%	17,538 6%	12,566 5%	8,823 4%	7,685 4%	7,937 4%	8,114 4%
World Totals	268,678	304,568	262,056	281,590	280,563	246,252	206,935	206,677	211,445	215,639

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

**SEPTEMBER 1 U.S. HOP STOCKS 1981 – 2001**

Year	(000's Pounds)			
	Brewer	Dealer	Grower	TOTAL
1981	32,240	1,950	240	34,430
1982	43,740	2,090	1,200	47,030
1983	56,700	3,000	1,380	61,080
1984	60,480	6,256	1,360	68,096
1985	58,130	10,930	1,400	70,460
1986	60,630	8,930	1,390	70,950
1987	62,430	6,580	1,620	70,630
1988	49,090	9,160	1,750	60,000
1989	43,200	8,500	-	51,700
1990	46,810	5,080	-	51,890
1991	45,200	9,000	-	54,200
1992	46,270	9,980	-	56,250
1993	45,520	12,540	-	58,060
1994	47,070	15,930	-	63,000
1995	42,800	13,100	-	55,900
1996	47,000	11,700	-	58,700
1997	44,500	17,500	-	62,000
1998	41,000	14,000	-	55,000
1999	39,500	14,500	-	54,000
2000	37,500	10,500	-	48,000
2001	38,000	16,000	-	54,000

SOURCE: USDA NASS. Prepared by HGA.

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

**U.S. HOP TRADE BALANCE**

Year	Value of	Value of	TRADE
	Hop Imports <sup>1</sup>	U.S. Hop Exports <sup>2</sup>	SURPLUS
	----- (x US\$1.000) -----		
1990-91	\$39,787	\$73,852	\$34,065
1991-92	\$41,226	\$103,914	\$62,688
1992-93	\$23,661	\$108,275	\$84,614
1993-94	\$40,668	\$98,400	\$57,732
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

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. ALPHA ACID BY VARIETY**

VARIETY	1997	1998	1999	2000	2001
Mt. Hood	4.8%	4.0%	5.0%	4.3%	4.6%
Willamette	4.2%	4.3%	5.5%	4.7%	4.8%
Cascade	5.5%	5.0%	5.6%	5.8%	6.0%
Perle	No Data	4.5%	7.0%	7.2%	7.9%
Cluster	7.1%	6.8%	7.5%	7.9%	7.5%
Chinook	11.4%	11.4%	12.0%	11.8%	12.4%
Galena	11.8%	11.9%	12.5%	13.2%	12.4%
Nugget	13.3%	12.5%	13.0%	13.6%	13.4%
Super Alphas	No Data	14.5%	14.0%	14.4%	14.4%

SOURCE: Hop Merchants. Figures Represent an estimated alpha percentages as of 12/31/00 (ASBC-Spectro)

**U.S. & GERMAN ALPHA ACID PRODUCTION 1991-2001**

YEAR	UNITED STATES		GERMANY	
	Pounds** (x 1,000)	Avg Alpha*	Pounds (x 1,000)	Avg. Alpha
1991	6,277	9.1	5,042	6.3
1992	6,953	9.4	3,053	4.8
1993	7,767	10.2	5,970	6.4
1994	7,086	9.5	2,335	3.7
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

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.

**WORLD ALPHA PRODUCTION & CONSUMPTION 1990 - 2001**

ALPHA PRODUCTION		Year	ALPHA CONSUMPTION (thousands of pounds)			Estimated Accumulated Surplus/Deficit Worldwide** (thousands of pounds)
Pounds (x 1,000)			Alpha Dosage grams alpha / hl	Alpha Consumption*	Surplus/ Deficit	
Year	World Total	Year				
1990	15,184	1991	6.8	17,445	-2,261	0
1991	19,191	1992	6.7	17,333	1,858	-402
1992	16,666	1993	6.5	17,427	-762	-1,164
1993	20,278	1994	6.3	17,458	2,820	1,656
1994	15,207	1995	6.2	17,627	-2,420	-764
1995	17,260	1996	6.0	17,475	-215	-979
1996	20,576	1997	5.7	17,403	3,172	2,194
1997	19,867	1998	5.6	16,715	3,151	5,345
1998	16,055	1999	5.5	16,882	-827	4,518
1999	16,045	2000	5.5	17,054	-1,009	3,290
2000	17,273	2001	5.5	17,171	103	2,798
2001	17,478	2002	5.4	17,000	478	3,276

SOURCE: IHGC, 2001 Hop Merchant Reports, Prepared by HGA \* Consumption estimated by calculating averages from both Steiner and Barth report projections. Production is at harvest values and includes hops lost to fire. \*\*Estimated accumulated surplus/deficit DOES NOT include alpha destroyed by fires to more accurately reflect potential real world surpluses. HGA subtracted the following numbers for the alpha adjustment: 1999: 220,000 pounds lost, 2000: 595,000 pounds lost.

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

SEPTEMBER 2000 – AUGUST 2001 (Metric Tons)						
COUNTRY		CONES	PELLETS	EXTRACT Hop Equiv= X*4	TOTAL	PERCENT OF TOTAL
1	Mexico	126.8	46.6	3235.6	3409.0	12.2%
2	Brazil	1,010.9	156.2	1722.0	2889.1	10.4%
3	Germany	581.1	577.2	1687.2	2845.5	10.2%
4	Canada	51.6	583.1	2048.0	2682.7	9.6%
5	Belgium-Luxembourg	12.2	824.2	1550.8	2387.2	8.6%
6	United Kingdom	88.4	149.8	1248.4	1486.6	5.3%
7	Netherlands	25.3	30.9	1034.8	1091.0	3.9%
8	Dominican Republic	1.7	7.7	1060.0	1069.4	3.8%
9	Colombia	171.4	13.3	711.2	895.9	3.2%
10	Hong Kong	22.9	119.4	730.8	873.1	3.1%
11	Korea, Republic Of	81.9	30.5	727.2	839.6	3.0%
12	Japan	208.0	213.4	385.2	806.6	2.9%
13	Australia	1.2	4.9	633.2	639.3	2.3%
14	Nigeria	0.0	0.0	594.4	594.4	2.1%
15	Venezuela	19.5	142.1	431.2	592.8	2.1%
16	Thailand	0.0	225.7	350.8	576.5	2.1%
17	Ireland	0.6	49.0	428.8	478.4	1.7%
18	Philippines	7.4	26.8	351.6	385.8	1.4%
19	Argentina	75.8	121.2	110.4	307.4	1.1%
20	France	10.4	2.1	237.2	249.7	0.9%
Sub Total		2,497.1	3,324.1	19,278.8	25,100.0	90.0%
All Other Countries		493.4	285.5	2,128.4	2,907.3	10.0%
TOTAL EXPORTS		2,990.5	3,609.6	21,407.2	28,007.3	100.0%

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. HOP EXPORTS – REGIONAL ANALYSIS**

PERCENT OF TOTAL U.S. HOP EXPORTS				
REGION	1997 – 1998	1998 - 1999	1999 - 2000	2000-2001
EUROPE	33%	37%	37%	33%
NORTH AMERICA	23%	25%	22%	22%
SOUTH AMERICA	26%	17%	18%	19%
ASIA	13%	9%	16%	17%
CARIBBEAN	1%	5%	4%	5%
ALL OTHERS	4%	7%	3%	4%

SOURCE: USDA Hop Market News. Prepared by HGA

*U.S. HOP EXPORTS 96/97 – 00/01 (Pounds x 1,000)*

COUNTRY	'96-'97	'97-'98	'98-'99	'99-'00	'00-'01
Canada	3,721	3,329	3,256	3,762	5,914
Mexico	3,677	5,619	5,630	5,244	7,515
Costa Rica	68	55	27	21	181
El Salvador	54	0	163	7	35
Guatemala	137	7	109	75	57
Honduras	109	21	123	4	81
Nicaragua	48	109	0	49	12
Dominican Republic	248	451	1,300	1,332	2,357
Jamaica	157	0	52	161	160
Trinidad and Tobago	45	21	159	7	59
Argentina	1,263	809	631	768	677
Bolivia	201	353	214	122	38
Brazil	8,113	4,589	3,209	4,045	6,369
Chile	253	170	201	142	159
Colombia	1,351	2,162	613	799	1,975
Ecuador	13	281	108	376	313
Peru	491	263	439	394	159
Uruguay	37	95	43	40	8
Venezuela	392	1,256	783	466	1,306
Belgium	814	1,104	1,547	3,096	5,262
Denmark	21	60	189	104	249
Finland	123	68	75	247	70
France	2,631	1,510	288	485	550
Germany	4,013	4,088	3,669	4,734	6,273
Hungary	21	0	391	0	0
Ireland	1,081	881	939	438	1,054
Italy	82	0	103	178	289
Netherlands	1,328	754	851	1,631	2,405
Portugal	333	510	291	470	143
Russia	460	179	422	399	159
Spain	333	123	60	35	65
Switzerland	135	157	113	31	270
United Kingdom	2,721	3,499	3,413	2,496	3,277
Nigeria	144	116	321	40	1,310
South Africa	0	0	66	33	6
China	301	614	66	444	356
Hong Kong	1,008	1,364	487	1,357	1,924
Japan	1,331	1,020	1,509	1,289	1,778
Korea	525	393	126	948	1,850
Malaysia	103	152	173	236	206
Philippines	500	653	855	910	850
Singapore	27	52	75	166	107
Taiwan	369	686	0	0	1
Australia	629	512	803	706	1,409
Papua New Guinea	280	7	41	21	46
Sri Lanka	0	41	66	4	31
Thailand	122	532	532	779	1,270
<b>SUB TOTAL</b>	<b>39,813</b>	<b>38,665</b>	<b>34,531</b>	<b>39,084</b>	<b>58,585</b>
<b>ALL OTHERS</b>	<b>706</b>	<b>757</b>	<b>1,432</b>	<b>1,746</b>	<b>2,894</b>
<b>TOTAL</b>	<b>40,519</b>	<b>39,422</b>	<b>35,963</b>	<b>40,830</b>	<b>61,479</b>

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)****CONES<sup>1</sup>**

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Gemany	NZ	Poland	U.K.	Yugo	Other	Total
1991-92	11	0	358	4,489	4,550	586	6,014	55	871	4	0	0	16,938
1992-93	227	0	472	1,102	1,810	567	2,919	0	518	4	110	0	7,729
1993-94	265	0	628	0	1,931	1,082	6,228	300	602	28	0	5	11,069
1994-95	280	0	536	0	1,892	1,177	5,974	0	240	62	13	20	10,194
1995-96	328	0	234	0	278	1,345	7,665	209	237	152	0	68	10,516
1996-97	340	0	185	0	317	1,378	6,607	2	97	159	0	119	9,204
1997-98	7	0	203	0	170	1,283	4,652	2	2	112	0	0	6,431
1998-99	85	44	0	0	130	1,402	6,389	2	0	35	0	2	8,089
1999-00	2	0	2	0	663	1,774	5,760	31	0	205	0	11	8,450
2000-01	0	26.7	0	0	69.2	2,313	3,409	1.9	0	97.6	0	0	5,919

**PELLETS**

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Gemany	NZ	Poland	U.K.	Yugo	Other	Total
1991-92	723	84	0	44	24	0	750	119	0	42	178	0	1,964
1992-93	9	0	0	0	7	0	831	340	4	79	0	0	1,270
1993-94	0	0	0	0	53	0	1,634	150	0	201	0	0	2,038
1994-95	4	0	0	42	9	47	1,605	410	0	357	0	2	2,476
1995-96	0	0	0	42	15	0	1,642	294	0	450	0	0	2,443
1996-97	0	0	0	0	90	0	2,438	560	0	441	0	31	3,560
1997-98	181	0	0	0	99	0	2,892	514	0	410	0	99	4,195
1998-99	202	0	0	0	44	0	1,426	304	0	223	0	23	2,222
1999-00	220	0	0	0	2	0	1,675	580	20	106	0	0	2,603
2000-01	1,006	0	0	0	12.3	0	1,296	601	0	163	10	0	3,090

**TOTAL EXTRACT – HOP EQUIVALENT (Actual x 4)**

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Gemany	NZ	Poland	U.K.	Yugo	Other	Total
1991-92	0	0	0	0	0	0	28	0	0	16	0	0	44
1992-93	0	0	18	0	0	0	44	0	0	203	0	0	265
1993-94	0	0	0	0	0	0	26	0	0	53	0	0	79
1994-95	0	0	0	0	0	0	0	0	0	97	0	0	97
1995-96	0	0	0	0	0	0	133	0	0	17	0	18	168
1996-97	35	0	0	0	0	0	71	0	0	35	0	0	141
1997-98	0	0	0	0	0	0	335	0	0	9	0	0	344
1998-99	0	0	0	0	0	0	6	0	0	105	0	0	111
1999-00	0	0	0	0	0	0	7	27	0	526	0	0	560
2000-01	0	7	0	0	0	10	125	18	0	35	0	1	197

**TOTAL HOP IMPORTS**

Mktg Yr	Aust	Belg	Canada	China	Czech	France	Gemany	NZ	Poland	U.K.	Yugo	Other	Total
1991-92	734	84	358	4,533	4,574	586	6,792	174	871	62	178	0	18,946
1992-93	236	0	490	1,102	1,817	567	3,794	340	522	286	110	0	9,264
1993-94	265	0	628	0	1,984	1,082	7,888	450	602	282	0	5	13,186
1994-95	284	0	536	42	1,901	1,224	7,579	410	240	516	13	22	12,767
1995-96	328	0	234	42	293	1,345	9,440	503	237	619	0	86	13,127
1996-97	375	0	185	0	408	1,378	9,116	562	97	635	0	150	12,906
1997-98	187	0	203	0	269	1,283	7,879	516	2	531	0	99	10,970
1998-99	287	44	0	0	174	1,402	7,821	306	0	363	0	25	10,422
1999-00	222	0	2	0	665	1,774	7,442	638	20	837	0	11	11,614
2000-01	1007	34	0	0	82	2,324	4,831	621	0	296	10	1	9,205

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.

**WORLD'S 35 LARGEST BREWERS (2000 RANKING)**

	BREWERY GROUP NAME & LOCATION	2000 MIL HL	WORLD MARKET SHARE	% CHANGE 99-00	CUMMULATIVE PERCENTAGE
1	ANHEUSER-BUSCH U.S.A.	115.3	8.3%	1.3%	8.3%
2	HEINEKEN Netherlands	78.0	5.6%	15.2%	13.9%
3	INTERBREW Subtotal (Interbrew/Whitbread/Bass) Belgium	76.4	5.5%	99.0%	19.4%
4	AMBEV Brazil	62.0	4.5%	3.3%	23.8%
5	CARLSBERG Subtotal (Carlsberg/Pripps/Hartwall/Baltica) Denmark	60.0	4.3%	-29.8%	28.1%
6	SAB S. Africa	60.0	4.3%	6.4%	32.4%
7	PHILIP MORRIS (Miller) U.S.A.	53.0	3.8%	4.3%	36.2%
8	MODELO Mexico	36.6	2.6%	4.9%	38.9%
9	SCOTTISH COURAGE U.K.	35.8	2.6%	-10.5%	41.4%
10	KIRIN Japan	27.2	2.0%	-4.5%	43.4%
11	COORS U.S.A.	27.0	1.9%	4.6%	45.3%
12	ASAHI Japan	25.2	1.8%	0.3%	47.1%
13	FEMSA (Cuauhtemoc) Mexico	23.6	1.7%	0.0%	48.8%
14	TSINGTAO China	18.6	1.3%	221.0%	50.2%
15	SANTO DOMINGO GROUP (Bavaria) Colombia	17.0	1.2%	-19.0%	51.4%
16	MOLSON GROUP Canada	16.0	1.1%	36.8%	52.5%
17	DIAGEO/GUINNESS U.K. / Ireland	15.0	1.1%	-45.5%	53.6%
18	YANJING BREWERY China	14.1	1.0%	88.0%	54.6%
19	SAN MIGUEL Philippines	13.0	0.9%	25.0%	55.6%
20	POLAR GROUP Venezuela	12.0	0.9%	-20.0%	56.4%
21	HOLSTEN GROUP + König Germany	11.7	0.8%	42.7%	57.3%
22	QUILMES GROUP Argentina	11.5	0.8%	-1.4%	58.1%
23	FOSTER'S BREWING GROUP Australia	11.5	0.8%	-1.7%	58.9%
24	BRAU UNION Austria	11.0	0.8%	18.3%	59.7%
25	KAISER Brazil	11.0	0.8%	-15.4%	60.5%
26	SCHINCARIOL Brazil	11.0	0.8%	10.0%	61.3%
27	HITE (formerly CHOSUN) Korea	11.0	0.8%	22.2%	62.1%
28	SAPPORO Japan	10.6	0.8%	-1.5%	62.9%
29	BINDING GROUP Germany	10.0	0.7%	-12.3%	63.6%
30	LION NATHAN New Zealand	9.5	0.7%	-6.9%	64.3%
31	BGI/CASTEL GROUP France	8.0	0.6%	0.0%	64.8%
32	BRAU + BRUNNEN Germany	7.8	0.6%	-8.2%	65.4%
33	ZHUJIANG China	7.4	0.5%	0.5%	65.9%
34	SUNTORY Japan	7.3	0.5%	0.5%	66.4%
35	CARLSBERG - Chang Thailand	7.3	0.5%	0.5%	67.0%

SOURCE: John I. Haas, Inc.



**WORLD BEER PRODUCTION 1991, 1996-2001 (MILLION HL)**

	1991	1996	1997	1998	1999	2000	2001*
Germany	118.0	114.2	114.8	108.3	112.8	110.4	109.0
Great Britain	60.8	58.4	59.1	55.7	57.9	55.3	54.5
Russia	0.0	20.6	25.2	38.9	45.9	60.5	65.0
Spain	26.4	24.7	24.9	24.7	25.9	26.5	27.0
Netherlands	19.9	23.5	24.7	24.5	24.5	25.1	25.3
France	22.9	20.4	19.5	19.4	19.8	18.9	18.0
Poland	12.0	16.5	18.8	22	22.5	23.5	23.5
Czech Republic	0.0	18.2	18.6	18.4	17.9	18.0	18.0
Belgium	14.1	14.2	14.2	14.2	14.2	14.7	14.4
Italy	10.7	11.1	11.5	12.5	12.1	12.6	12.7
Austria	10.2	9.5	9.4	8.4	8.9	8.8	8.9
Denmark	8.7	9.6	9.2	7.5	8	7.5	7.7
USA	237.3	236	236.4	238	236.5	233.0	231.0
Brazil	65.0	88.5	88.2	89.2	88.6	90.0	90.0
Mexico	40.8	47.2	51.9	56.9	57.3	60.3	63.5
Canada	22.1	22.5	22.4	22.81	22.9	23.0	23.2
Colombia	24.0	18.5	20	18.4	16.5	16.5	16.0
Venezuela	12.9	15	17.2	18.1	17.1	15.5	15.8
Argentina	8.3	11.5	12.1	12	13	12.6	12.3
China	80.0	163.2	170	180	180	210.0	215.0
Japan	68.0	68.7	67.7	71.5	71.5	71.0	71.0
South Korea	16.4	16.8	16.7	13.8	13.8	18.6	19.0
Philippines	15.4	13.2	13.5	12.5	12.4	12.2	12.1
South Africa	22.5	24.8	25	25.7	25.7	24.5	24.0
Australia	19.0	17.4	17.3	17.8	17.6	17.2	17.2
Nigeria	8.3	4.2	4.3	1.1	1.1	6.0	6.3
New Zealand	3.7	3.4	3.2	4.2	3.2	3.0	3.0
All Other Countries	217.8	176.9	54.9	187.5	197.0	200.2	208.3
<b>WORLD TOTALS:</b>	<b>1,165.20</b>	<b>1,268.7</b>	<b>1,170.7</b>	<b>1,324</b>	<b>1,344.6</b>	<b>1,395.4</b>	<b>1,411.7</b>

SOURCE: Barth &amp; Steiner Reports. Prepared by HGA

\*estimate

**TEN LARGEST BEER PRODUCING COUNTRIES**

COUNTRY	2000 BEER PRODUCTION (IN 000 HECTOLITERS)	MARKET SHARE OF THE TWO LARGEST BREWERIES
United States	232,500	70%
China	220,000	15%
Germany	110,429	19%
Brazil	82,000	87%
Japan	70,998	77%
Mexico	60,253	100%
The United Kingdom	55,279	60%
Russia	54,900	50%
Spain	26,400	40%
The Netherlands	25,072	90%

SOURCE: John I. Haas, Inc.

***THANK YOU***

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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