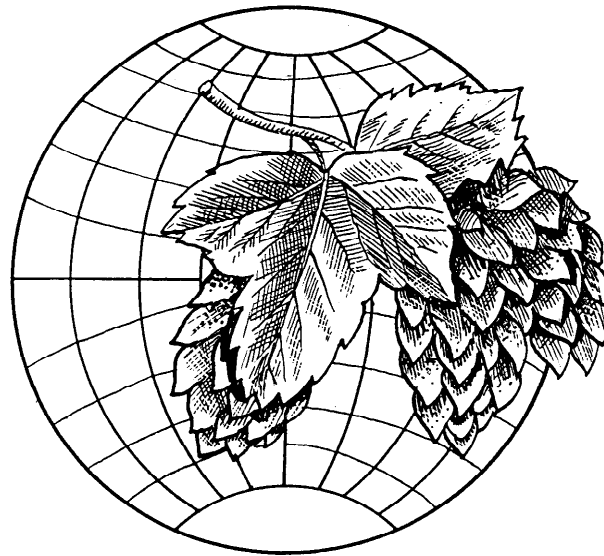


# INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

NUREMBERG, GERMANY

NOVEMBER, 2015



# International Hop Growers' Convention

## IHGC - Economic Commission Summary Reports

Nuremberg, Germany - November, 9, 2015

Country	Hop Acreage 2014 (Hectares, Ha)					Hop Production 2014 (in MT = 1.000 kg)				Alpha acid Prod. MT	Hop Acreage 2015 (Hectares, Ha) estimations					Hop Production 2015 (in MT = 1.000 kg) estimations				Alpha acid Prod. MT
	Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	Aroma		Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	MT		
Australia <sup>°</sup>	64	344	408	0	408	200	879	1 079	140	88	400	488	0	488	200	1 001	1 201	150		
Austria	186	58	244	3	247	385	106	491	40	187	58	245	4	249	219	79	298	20		
Belgium	77	71	148	0	148	87	99	187	13	83	65	148	6	148	107	117	224	17		
China*	300	2 350	2 650	0	2 650	300	5 400	6 900	483	250	2 050	2 300	0	2 300	300	5 700	6 000	440		
Czech Republic	4 007	47	4 054	406	4 460	6 117	85	6 202	240	4 149	43	4 192	430	4 622	4 725	75	4 800	125		
France	327	53	380	80	431	530	106	636	25	364	49	413	27	440	491	64	555	17		
Germany	9 199	6 900	16 099	1 209	17 308	19 409	19 091	38 500	4 104	9 675	7 019	16 694	1 153	17 847	13 720	14 480	28 200	2 700		
New Zealand	288	82	370	0	370	587	178	765	74	328	60	388	0	388	600	140	740	70		
Poland	507	798	1 305	106	1 410	784	1 288	2 072	165	563	785	1 347	76	1 424	787	1 334	2 121	150		
Romania	63	182	245	5	250	61	111	172	18	63	187	250	20	270	52	162	214	21		
Russia <sup>°</sup>	84	54	138	20	158	92	70	162	9	84	54	138	20	158	92	70	162	9		
Serbia <sup>°</sup>	34	33	67	12	79	58	76	134	11	34	33	67	12	79	58	76	134	11		
Slovakia	137	0	137	0	137	183	0	183	6	137	0	137	0	137	94	0	94	3		
Slovenia	1 104	36	1 140	157	1 296	2 248	70	2 318	175	1 203	25	1 228	175	1 403	1 607	70	1 677	130		
South Africa <sup>°</sup>	0	420	420	0	420	0	820	820	108	0	420	420	0	420	0	820	820	108		
Spain <sup>°</sup>	0	520	520	0	520	0	933	933	110	0	534	534	0	534	0	950	950	110		
Ukraine <sup>°</sup>	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30		
UK-England	704	223	927	0	927	1 000	455	1 455	105	684	210	894	5	894	900	400	1 300	100		
USA	10 000	5 382	15 382	1 639	15 382	17 567	14 637	32 204	3 541	13 653	4 654	18 307	2 925	18 307	21 000	15 380	36 380	3 856		
<b>IHGC</b>	<b>27 390</b>	<b>17 613</b>	<b>45 003</b>	<b>3 637</b>	<b>46 970</b>	<b>50 008</b>	<b>44 484</b>	<b>95 693</b>	<b>9 397</b>	<b>31 854</b>	<b>16 706</b>	<b>48 559</b>	<b>4 853</b>	<b>50 477</b>	<b>45 352</b>	<b>40 998</b>	<b>86 350</b>	<b>8 067</b>		

<sup>°</sup> Since no country updates were available, figures from Bad Gögging 2015 were used.

<sup>1</sup> Acreage without new hop areas

\* IHGC estimation

Difference  $\Sigma$  2015-2014      4 464      -907      3 556      1 216      3 507      -4 656      -3 486      -9 343      -1 330



# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**Austria**

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	25,4	6,6	10,5	4,8	-14,9	-58,6
Alpha	14,8	14,0	9,5	12,0	-5,4	-36,1
Total	40,3		20,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons	298	395	370			
% Crop / Year N	100	92	85			

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops		6,5			
Alpha Hops		3,9			
Average Price					
<b>Contract Prices</b>					
Aroma Hops	6,3	6,5	<b>6,5</b>	0	Erzeugerpreis / kg RH
Alpha Hops	6,3	7,2	<b>6,2</b>	-13,9	Erzeugerpreis / kg RH
Average Price	6,3				
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: 16.7.2015

Member Organization:



# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**Belgium**

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma			5,3			
Alpha			11,7			
Total			17,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	50%	40%	30%	10%		

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

The aroma varieties are sold out.  
 Got any question for the alpha varieties.  
 Switching of alpha production to aroma varieties continues.  
 The demand for aroma hop is higher than the offer

Country, Date:  
 Belgium, 6/11/2015

Member Organization(s):  
 Eric Lagache



# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country: <b>Czech Republic</b>
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Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	231,0	3,9	120,0			
Alpha	9,0	11,0	5,0			
Total	240,0	4,01	125,0		-115,0	-47,9

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	100	100	100	99	90	85

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops	6,5	6,5			farmer price
Alpha Hops	4	4			farmer price
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:  
2.11.2015

Member Organization(s):  
Hop Growers Union of the Czech Rep.



# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**France**

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015	Difference N - (N-1)	Difference %
Aroma	327	364	37	111,3%
Alpha	53	49	-4	92,5%
Total	380	413	33	108,7%

New Hop Area (Ha)	Year N-1 2014	Year N 2015
Aroma	80	27
Alpha	-	-
Total	80	27

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015	Difference N - (N-1)	Difference %
Aroma	378	403	25	106,6%
Alpha	53	37	-16	69,8%
Total	431	440	9	102,1%

Production MT=Metric Tons	Year N-1 2014	Year N 2015	Difference N - (N-1)	Difference %
Aroma	530	491	-39	92,6%
Alpha	106	64	-42	60,4%
Total	636	555	-81	87,2%

Yield MT/Ha	Year N-1 2014	Year N 2015	Difference %
Aroma	1,6	1,2	0,8
Alpha	2,0	1,7	0,9
Total	1,7	1,3	0,8

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Strisselspalt	180	180	0	1,20		
Aramis	47	46	-1	5,10		
Tradition	35	32	-3	3,50		
Triskel	22	21	-1	2,20		
Fuggle	31	38	7	2,70		
Golding	32	37	5	1,50		
Challenger	6	6	0	6,35		
Barbe-Rouge		2	2	5,00		
GS26	1	5	4	5,00		
Alpha						
Columbus	11	9,3	-1,7	8,40		
Brewers Gold	10,8	10,8	0	4,00		
Nugget	21	16	-5	8,00		
Magnum	5	5	0	12,00		
Target	5	5	0	10,30		

# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**France**

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	2015	%		%
Aroma	17,2	3,2	11,2	2,3	-6,0	0,7
Alpha	7,8	7,4	5,6	8,8	-2,2	0,7
Total	25,0	3,9	16,8	3,0	-8,2	0,7

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	75	70	60	55	45	45

Unsold Hops (MT) : Crop Year	2015	Aroma	Alpha	Total
Total Hop Production		491	64	555
- Sold Production		491	64	555
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:  
November 3, 2015

Member Organization(s):  
AGPH  
Francis Heitz

# International Hop Growers' Convention

IHGC-Economic Commission: Nov. 2015 - Nürnberg, Germany

Country:

**Germany**

Hop area ( ha )	Year N-1 2014	Year N 2015	Difference N - (N-1)	Difference %
Aroma	9199	9675	476	5,2
Alpha	6900	7019	119	1,7
Total	16099	16694	595	3,7

New Hop Area ( ha )	Year N-1 2014	Year N 2015
Aroma	677	656
Alpha	532	497
Total	1209	1153

TOTAL Hop area ( ha )	Year N-1 2014	Year N 2015	Difference N - (N-1)	Difference %
Aroma	9876	10331	455	4,6
Alpha	7432	7516	84	1,1
Total	17308	17847	539	3,1

Production MT	Year N-1 2014	Year N 2015	Difference N - (N-1)	Difference %
Aroma	19 409	13 720	-5 689	-29,3
Alpha	19 091	14 480	-4 611	-24,2
Total	38 500	28 200	-10 300	-26,8

Yield MT/HA.	Year N-1 2014	Year N 2015	Difference %
Aroma	2,0	1,3	-32,4
Alpha	2,6	1,9	-25,0
Total	2,2	1,6	-29,0

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Perle	3154	3187	33	8	4,5	-3,5
Hall.Tradition	2825	2914	89	5,8	4,7	-1,1
Hersbrucker	924	954	30	2,1	2,3	0,2
Hallertauer	838	746	-92	4,2	2,8	-1,4
Tettnanger	762	744	-18	4,1	2,1	-2
Spalter Select	523	533	10	4,7	3,2	-1,5
Saphir	381	423	42	3,9	2,5	-1,4
Spalter	112	113	1	3,4	2,2	-1,2
Mand. Bavaria	99	207	108			0
Alpha						
Herkules	3622	4152	530	17,5	15,1	-2,4
Hall. Magnum	2642	2353	-289	12,6	12,2	-0,4
Hall.Taurus	594	465	-129	17,4	12,9	-4,5
North. Brewer	267	238	-29	9,7	5,4	-4,3
Nugget	173	162	-11	9,9	9,2	-0,7
Polaris	53	60	7			0
Hall. Merkur	31	26	-5			0
Brewers Gold	17	17	0			0
Comet	3	5	2			0

# International Hop Growers' Convention

IHGC-Economic Commission: Nov. 2015 - Nürnberg, Germany

Country: <b>Germany</b>
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Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	estimate	%		%
Aroma	1126,0	5,8	550,0	4,0	-576,0	-1,8
Alpha	2978,0	15,6	2150,0	14,8	-828,0	-0,8
Total	4 104	10,7	2700,0	9,6	-1404,0	-1,1

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric Tons	29744	29738	28035	26602	20654	18295
% Crop / Year N	105	105	99	94	73	65

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production		19409,00	19 091	38 500
- Sold Production		19409,00	19 091	38 500
= Unsold Hops		0,00	0,00	0,00
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2012	Year (N-1) 2014	Year (N) 2015	% Diff. 2014 vs. 2013	Kind of Price
<b>Spot Prices</b>					
<i>Aroma Hops</i>	4,4	5,61		27,50	Farmer Price
<i>Alpha Hops</i>	2,66	4,25		59,80	Farmer Price
Average Price	3,18	4,78		50,30	Farmer Price
<b>Contract Prices</b>					
<i>Aroma Hops</i>	4,56	4,8		5,30	Farmer Price
<i>Alpha Hops</i>	4,13	4,05		-1,90	Farmer Price
Average Price	4,33	4,45		2,80	Farmer Price
<b>Average Prices</b>					
<i>Aroma Hops</i>	4,53	4,94		9,10	Farmer Price
<i>Alpha Hops</i>	3,87	4,1		5,90	Farmer Price
<b>AVERAGE</b>	4,16	4,52		8,70	Farmer Price

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Verband deutscher Hopfenpflanzer

Germany

3.11.2015

gez. Brunner



# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**New Zealand**

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(actual)	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2015	Aroma	Alpha	Total
Total Hop Production	740	600	140	
- Sold Production	703	570	133	
= Unsold Hops	37	30	7	
% unsold Hops	5			

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					Market
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

### Production situation:

Production remains focussed on increasing aroma varieties and decreasing alpha varieties. The harvest was completed by the end of March with what was at best considered an average crop with decreases in Wakatu variety and increases in Nelson Savin, Motueka and aroma types. New Zealand grows 23 varieties 13 of which are unique to New Zealand with 6 also grown as certified organic. (12.5 Ha) New Zealand remains hop disease free with an certified spray free crop. Production remains static through the process of switching varieties from high yielding alpha and dual purpose to lower yielding aroma specialty types.

### Market Conditions:

International market conditions remain favourable for New Zealand Hops entering 2015 harvest with a 95 % sold forward position. The industry expectation is that the complete crop will be sold prior to the 2016 harvest. Only small volumes of surplus and available spots remain.

# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**Poland**

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	506,53	562,52	55,99	11,1
Alpha	798,27	784,92	-14,00	-1,8
Total	1304,8	1347,44	42,64	3,3

New Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)
Aroma	79,76	41,9
Alpha	25,74	34,26
Total	105,5	76,16

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	586,29	604,42	18	3,1
Alpha	824,01	819,18	-5	-0,6
Total	1410,3	1423,6	13	0,9

Production MT=Metric Tons	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	784,19	787	3	0,0
Alpha	1 288,11	1334	46	4,0
Total	2 072,30	2121	49	2,0

Yield MT/Ha	Year N-1 2014	Year N 2015 (estimate)	Difference %
Aroma	1,55	1,40	-10,0
Alpha	1,61	1,70	5,6
Total	1,59	1,57	1,0

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Lubelski	369,21	383,76	14,55			
Lomik	4,36	4,14	-0,22			
Perle	61,89	61,1	-0,79			
Sybilla	70,75	77,1	6,35			
HT	80,08	77,7	-2,38			
Puławski	0	0,62	0,62			
Alpha						
Marynka	302,29	294,48	-7,81			
Magnum	505,83	495,54	-10,29			
Junga	6,36	7,39	1,03			
Taurus	9,01	8,22	-0,79			
Magnat	0,52	13,55	13,03			

# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**Poland**

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	31,3	4,00				
Alpha	133,5	10,36				
Total	165,0	7,96				

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production		784,19	1288,11	2072,3
- Sold Production		784,19	1288,11	2072,3
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	4,34	4,08			
Alpha Hops	2,77	3,3			
Average Price	3,56	3,69			
<b>Contract Prices</b>					
Aroma Hops	3,25	3,36			
Alpha Hops	2,79	2,93			
Average Price	3,02	3,15			
<b>Average Prices</b>					
Aroma Hops	3,8	3,72			
Alpha Hops	2,78	3,12			
<b>AVERAGE</b>	3,29	3,42			

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:  
Poland, 03.11.2015

Member Organization(s):  
Polish Hop Growers Association



# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:  
**Romania**

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	63	63	0	0,0
Alpha	182	187	5	2,7
Total	245	250	5	2,7

New Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)
Aroma	0	5
Alpha	5	15
Total	5	20

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	63	68	5	7,9
Alpha	187	202	15	8,0
Total	250	270	20	8,0

Production MT=Metric Tons	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	61	52	-9	-14,8
Alpha	111	162	51	45,9
Total	172	214	42	24,4

Yield MT/Ha	Year N-1 2014	Year N 2015 (estimate)	Difference %
Aroma	0,97	0,83	-14,8
Alpha	0,59	0,87	45,9
Total	0,69	0,86	24,4

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Perle	33	43	5	9,30	9,20	
Huller Bitter	30	25	-5	7,70	7,80	
	63	68	0	8,52		
Alpha						
Magnum	78	93	15	12,80	12,0	
Merkur	29	29	0	12,00	11,0	
Brewers Gold	80	80	0	7,80	7,5	
	187	202	15			

# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country: <b>Romania</b>
----------------------------

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	5,2	8,5	4,6	8,8	-0,6	-11,5
Alpha	12,6	11,4	16,5	10,2	3,9	31,0
Total	17,8	10,3	21,1	9,9	3,3	18,5

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons	270	290	320	340		
% Crop / Year N	79	85	90	95		

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production		61	111	172
- Sold Production		61	111	172
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:  
30. říjen 2015

Member Organization(s):  
Acatiu MORA +4(0) 0732 500 602



# International Hop Growers' Convention

IHGC-Economic Commission: Nov. 2015 - Nürnberg, Germany

Country:

**Slovakia**

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	6,3		3,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:  
4.11.2015

Member Organization(s):  
Menšík



# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**Slovenia**

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	175,0					

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	95	80	70			

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>	<b>4,5</b>	<b>5,6</b>	<b>4,5 - 6,0</b>		
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

A demand for the Styrian aroma hops made some growers enlarging their acreage. In addition, a recorded interest for flavour hops is reflected in increasing acreage of new flavour varieties, especially of Styrian Wolf and Styrian Cardinal. High temperatures with dry and water stress summer periods decreased significantly the crop 2015 in the Savinja Valley, while in the Koroška region a yield was higher and varies from the average.

Country, Date:  
Slovenia, October 27, 2015

Member Organization(s):  
Hop Growers of Slovenia /  
Hmezad exim / Inbarco

# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**UK**

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	704	684	-20	
Alpha	223	210	-13	
Total	927	894		

New Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)
Aroma	-	+5
Alpha	-	-
Total		

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	704	684	20	
Alpha	223	210	13	
Total	927	894	33	

Production MT=Metric Tons	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total				

Yield MT/Ha	Year N-1 2014	Year N 2015 (estimate)	Difference %
Aroma			
Alpha			
Total			

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
E K Goldings	93	97	+4	4,9	5,9	
Goldings	133	121	-12	4,6	5,2	
First Gold	105	99	-6	7,2	8,5	
Fuggles	84	83	-1	4,9	5,1	
Progress	58	59	+1	5,7	6,6	
Alpha						
Admiral	33	30	-3	13,8	12,5	
Target	85	80	-5	10,3	10,2	
Pilgrim	86	68	-18	9,3	6,6	
Northdown	18	15	-3	6,9	8,0	

# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country: <b>UK</b>
-----------------------

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Aroma market still strong  
Alpha market still weak

Country, Date:

Member Organization(s):  
Redsell



# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**USA**

Hop Area (Ha = Hectares)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	10 000	13 653	3 653	36,5%
Alpha	5 382	4 654	-728	-13,5%
<b>Total</b>	<b>15 382</b>	<b>18 307</b>	<b>2 925</b>	<b>19,0%</b>

New Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)
Aroma		
Alpha		
<b>Total</b>		

See attached breakdown  
for acreage by state and  
by variety.

TOTAL Hop Area (Ha)	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	10 000	13 653	3 653	36,5%
Alpha	5 382	4 654	-728	-13,5%
<b>Total</b>	<b>15 382</b>	<b>18 307</b>	<b>2 925</b>	<b>19,0%</b>

*Includes 505 ha outside of Pacific Northwest*

Production MT=Metric Tons	Year N-1 2014	Year N 2015 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 567	21 000	3 433	19,5%
Alpha	14 637	15 380	743	5,1%
<b>Total</b>	<b>32 204</b>	<b>36 380</b>	<b>4 176</b>	<b>13,0%</b>

*Assumes 850 MT outside of PNW (25% alpha, 75% aroma)*

Yield MT/Ha	Year N-1 2014	Year N 2015 (estimate)	Difference %
Aroma	1,76	1,54	-12,50%
Alpha	2,72	3,30	21,32%
<b>Total</b>	<b>2,09</b>	<b>1,99</b>	<b>-4,78%</b>

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma/Dual					8,6%	
ADHA-483 Azacca™	32	73	41			
ADHA-881 Jarrylo™	30	49	19			
Cascade	3 090	3 090	0			
Centennial	1 400	1 930	530			
Citra® (HBC 394)	735	1 169	434			
Chinook	720	700	-20			
Cluster	294	275	-19			
El Dorado	33	181	148			
Mosaic™ (HBC 369)	272	724	452			
Simcoe® (YCR 14)	744	1 322	578			
Willamette	475	575	100			
<b>Alpha</b>					<b>14,2%</b>	
Apollo	398	402	4			
Bravo	287	295	8			
CTZ	2 343	2 160	-183			
Nugget	670	662	-8			
Summit	1 073	685	-388			
Super Galena	367	206	-161			

# International Hop Growers' Convention

IHGC-Economic Committee: November 2015 - Nuremberg, Germany

Country:

**USA**

Alpha Prod.	Year N-1	2014	Year N	2015	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	3 541	10,9	3 856	10,6		

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2015	2016	2017	2018	2019	2020
Metric tons						
% Crop / Year N	99,5	100	100	80	80	50

Unsold Hops (MT) : Crop Year (N-1)	2014	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2013	Year (N-1) 2014	Year (N) 2015	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>	US\$3.35/lb	US\$3.83/lb			
	6.79 Euro/kg	7.77 Euro/kg			

## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate \$1 USD = 0.92 Euro (7 April 2015)

Alpha and aroma variety totals are based on the IHGC list of World Hop Varieties. Those varieties classified as "Dual" are included in the Aroma category for consistency. Varieties listed in the "Other" category in the US statistical reports produced by USDA-NASS are included in Aroma. This insures that Dual purpose and Other varieties are classified consistently throughout the year. The USDA statistical reporting system is voluntary, and individual varieties are not reported if three or fewer growers have the variety in each state. Alpha percentages are reported as 10% lower than spectro levels, to be more consistent with EBC results.

Country, Date:  
USA

lis.15

Member Organization(s):  
Hop Growers of America

**North American Hop Acreage Estimate**

**2015 June Strung for Harvest**

**Prepared by Hop Growers of America**

Contact Ann George, 509-453-4749, info@usahops.org

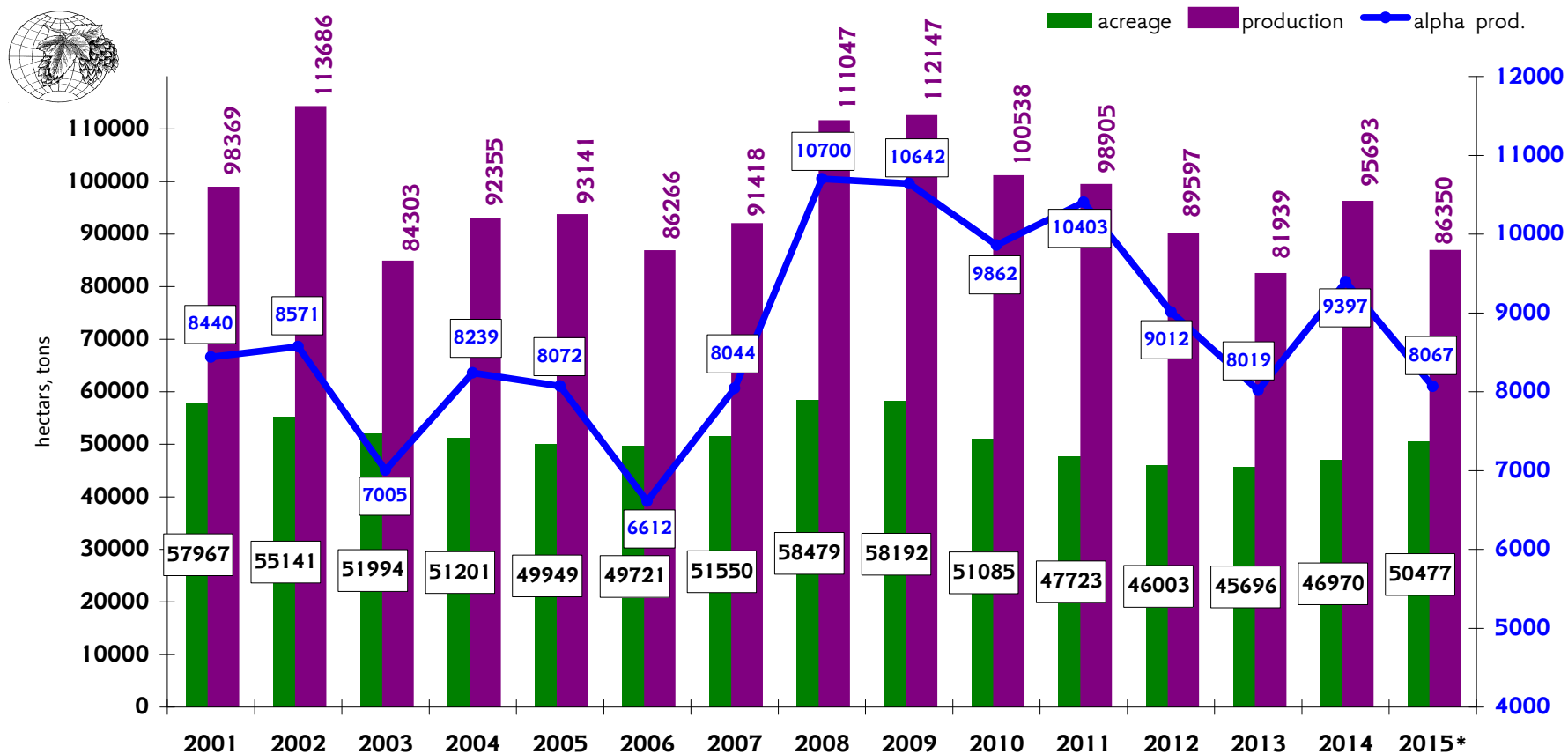
June 12, 2015

STATE/PROVINCE & VARIETY	ACRES STRUNG FOR HARVEST			2014-15
	2014 ac	2015 ac	2015 ha	% +/-
ARIZONA		1.0	0.4	
CALIFORNIA	65.0	85.0	34.4	30.77%
COLORADO	75.0	125.0	50.6	66.67%
IDAHO #				
Apollo	285.0	285.0	115.3	0.00%
Bravo	126.0	166.0	67.2	31.75%
Calypso		81.0	32.8	
Cascade	821.0	772.0	312.4	-5.97%
Centennial	74.0	265.0	107.2	258.11%
Chinook	344.0	256.0	103.6	-25.58%
Citra® (HBC 394)	91.0	327.0	132.3	259.34%
Crystal	29.0	101.0	40.9	248.28%
El Dorado®	63.0	205.0	83.0	225.40%
Mosaic™ (HBC 369)		272.0	110.1	
Simcoe® (YCR 14)	67.0	189.0	76.5	182.09%
Super Galena	161.0	92.0	37.2	-42.86%
Zeus	662.0	662.0	267.9	0.00%
Experimental	41.0	67.0	27.1	63.41%
Other Varieties	979.0	1,235.0	499.8	26.15%
<b>TOTAL IDAHO #</b>	<b>3,743.0</b>	<b>4,975.0</b>	<b>2,013.3</b>	<b>32.91%</b>
ILLINOIS	10.0	30.0	12.1	200.00%
INDIANA	8.0	25.0	10.1	212.50%
IOWA		5.0	2.0	
MAINE	10.0	11.5	4.7	15.00%
MARYLAND		15.0	6.1	
MICHIGAN	300.0	320.0	129.5	6.67%
MINNESOTA	20.0	26.0	10.5	30.00%
MONTANA	1.0	1.0	0.4	0.00%
NEBRASKA	12.0	17.0	6.9	41.67%
NEW YORK	150.0	250.0	101.2	66.67%
NORTH CAROLINA	30.0	40.0	16.2	33.33%
OHIO	30.0	50.0	20.2	66.67%
OREGON #				
Cascade	961.0	1,097.0	443.9	14.15%
Centennial	443.0	679.0	274.8	53.27%
Chinook		129.0	52.2	
Citra® (HBC 394)		235.0	95.1	
Crystal		397.0	160.7	
Fuggle		95.0	38.4	
Golding	234.0	238.0	96.3	1.71%
Liberty		177.0	71.6	
Magnum	176.0	270.0	109.3	53.41%
Mt. Hood	269.0	296.0	119.8	10.04%
Nugget	1,363.0	1,433.0	579.9	5.14%
Perle	100.0	96.0	38.8	-4.00%
Simcoe® (YCR 14)		189.0	76.5	
Sterling	130.0	220.0	89.0	69.23%
Super Galena	125.0	67.0	27.1	-46.40%
Tettnanger		141.0	57.1	
Willamette	564.0	718.0	290.6	27.30%
Experimental			0.0	
Other Varieties	1,045.0	330.0	133.5	-68.42%
<b>TOTAL OREGON #</b>	<b>5,410.0</b>	<b>6,807.0</b>	<b>2,754.6</b>	<b>25.82%</b>

PENNSYLVANIA		5.5	2.2	
VERMONT	25.0	45.0	18.2	80.00%
VIRGINIA	25.0	30.0	12.1	20.00%
WASHINGTON #			0.0	
ADHA-483 Azacca™	79.0	181.0	73.2	129.11%
ADHA-881 Jarrylo™	75.0	122.0	49.4	62.67%
Ahtanum™	194.0	145.0	58.7	-25.26%
Apollo®	700.0	708.0	286.5	1.14%
Bravo®	584.0	562.0	227.4	-3.77%
Cascade	4,837.0	4,934.0	1,996.7	2.01%
Centennial	2,836.0	3,770.0	1,525.6	32.93%
Chinook	1,297.0	1,300.0	526.1	0.23%
Citra® (HBC 394)	1,670.0	2,326.0	941.3	39.28%
Cluster	728.0	666.0	269.5	-8.52%
Columbus/Tomahawk®	1,738.0	1,677.0	678.6	-3.51%
Comet		108.0	43.7	
Crystal	181.0	131.0	53.0	-27.62%
El Dorado®	82.0	243.0	98.3	196.34%
Galena	306.0	294.0	119.0	-3.92%
Glacier	126.0	155.0	62.7	23.02%
Golding	94.0	53.0	21.4	-43.62%
Magnum		108.0	43.7	
Millennium	113.0	67.0	27.1	-40.71%
Mosaic™ (HBC 369)	671.0	1,518.0	614.3	126.23%
Mt. Hood	150.0	133.0	53.8	-11.33%
Northern Brewer	131.0	123.0	49.8	-6.11%
Nugget	265.0	202.0	81.7	-23.77%
Simcoe® (YCR 14)	1,819.0	2,889.0	1,169.1	58.82%
Summit™	2,522.0	1,688.0	683.1	-33.07%
Super Galena®	606.0	351.0	142.0	-42.08%
Tettnanger		38.0	15.4	
Vanguard	58.0	84.0	34.0	44.83%
Willamette	595.0	698.0	282.5	17.31%
YCR-4 - Palisade®	223.0	454.0	183.7	103.59%
YCR-5 - Warrior®	192.0		0.0	-100.00%
Zeus	3,375.0	2,989.0	1,209.6	-11.44%
Experimental	392.0	343.0	138.8	-12.50%
Other	2,219.0	3,145.0	1,272.7	41.73%
<b>TOTAL WASHINGTON #</b>	<b>28,858.0</b>	<b>32,205.0</b>	<b>13,032.7</b>	<b>11.60%</b>
WISCONSIN	120.0	170.0	68.8	41.67%
<b>TOTAL PACIFIC NORTHWEST</b>	<b>38,011.0</b>	<b>43,987.0</b>	<b>17,800.6</b>	<b>15.72%</b>
<b>TOTAL NON-PNW US ACREAGE</b>	<b>881.0</b>	<b>1,249.0</b>	<b>505.4</b>	<b>41.77%</b>
<b>TOTAL UNITED STATES</b>	<b>38,892.0</b>	<b>45,239.0</b>	<b>18,307.2</b>	<b>16.32%</b>
BRITISH COLUMBIA		79.0	32.0	
MANITOBA		5.0	2.0	
NEW BRUNSWICK		20.0	8.1	
NOVA SCOTIA		15.0	6.1	
ONTARIO		60.0	24.3	
PRINCE EDWARD ISLAND		7.5	3.0	
QUEBEC		70.0	28.3	
<b>TOTAL CANADA</b>		<b>256.5</b>	<b>103.8</b>	
<b>TOTAL NORTH AMERICA</b>		<b>45,495.5</b>	<b>18,411.0</b>	

**Figure 1: Comparison of IHGC crops 2001 - 2015\* (acreage, production, alpha acids production)**

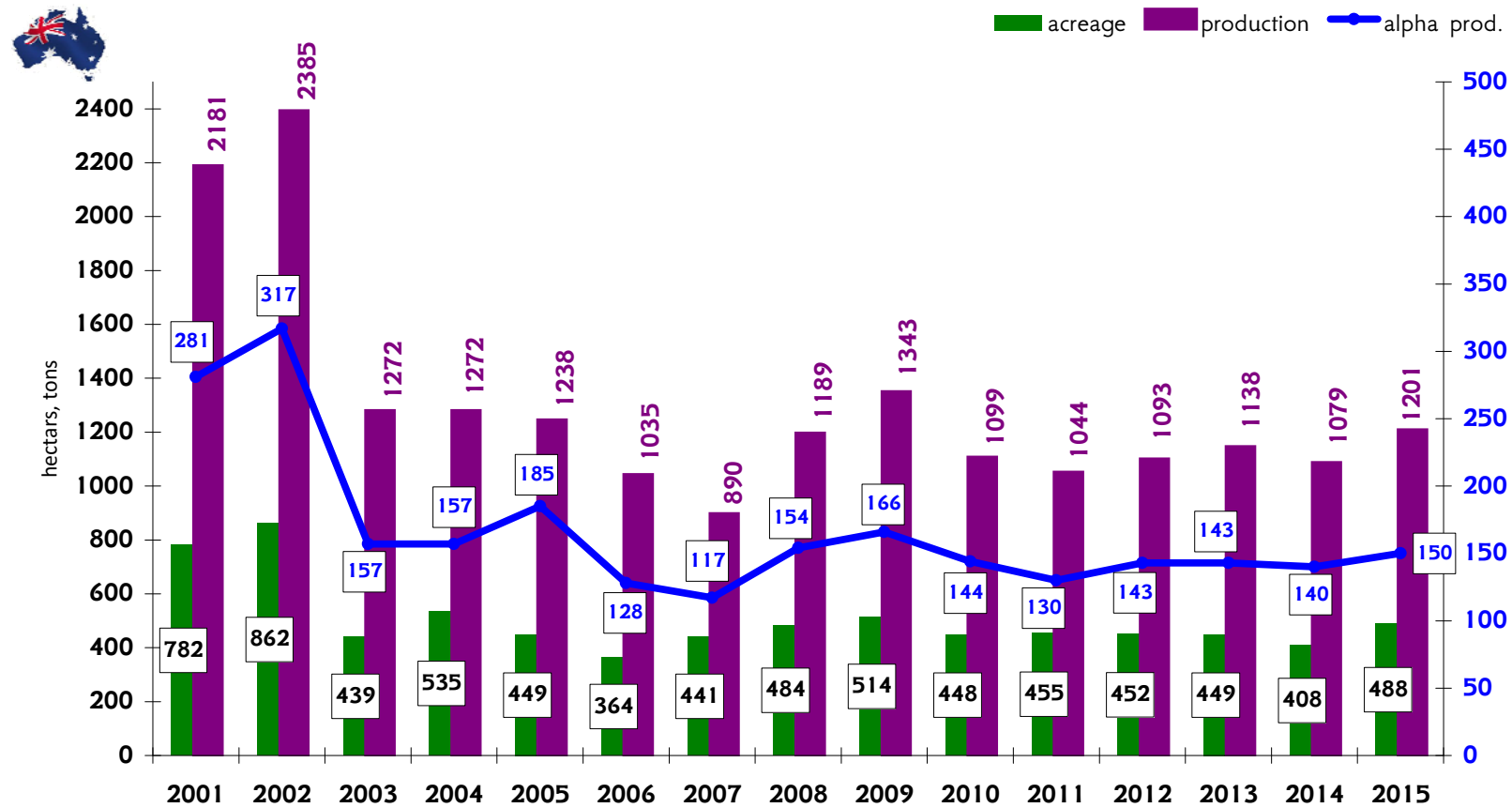
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	57967	55141	51994	51201	49949	49721	51550	58479	58192	51085	47723	46003	45696	46970	50477
production	98369	113686	84303	92355	93141	86266	91418	111047	112147	100538	98905	89597	81939	95693	86350
alpha prod.	8440	8571	7005	8239	8072	6612	8044	10700	10642	9862	10403	9012	8019	9397	8067



\* estimation

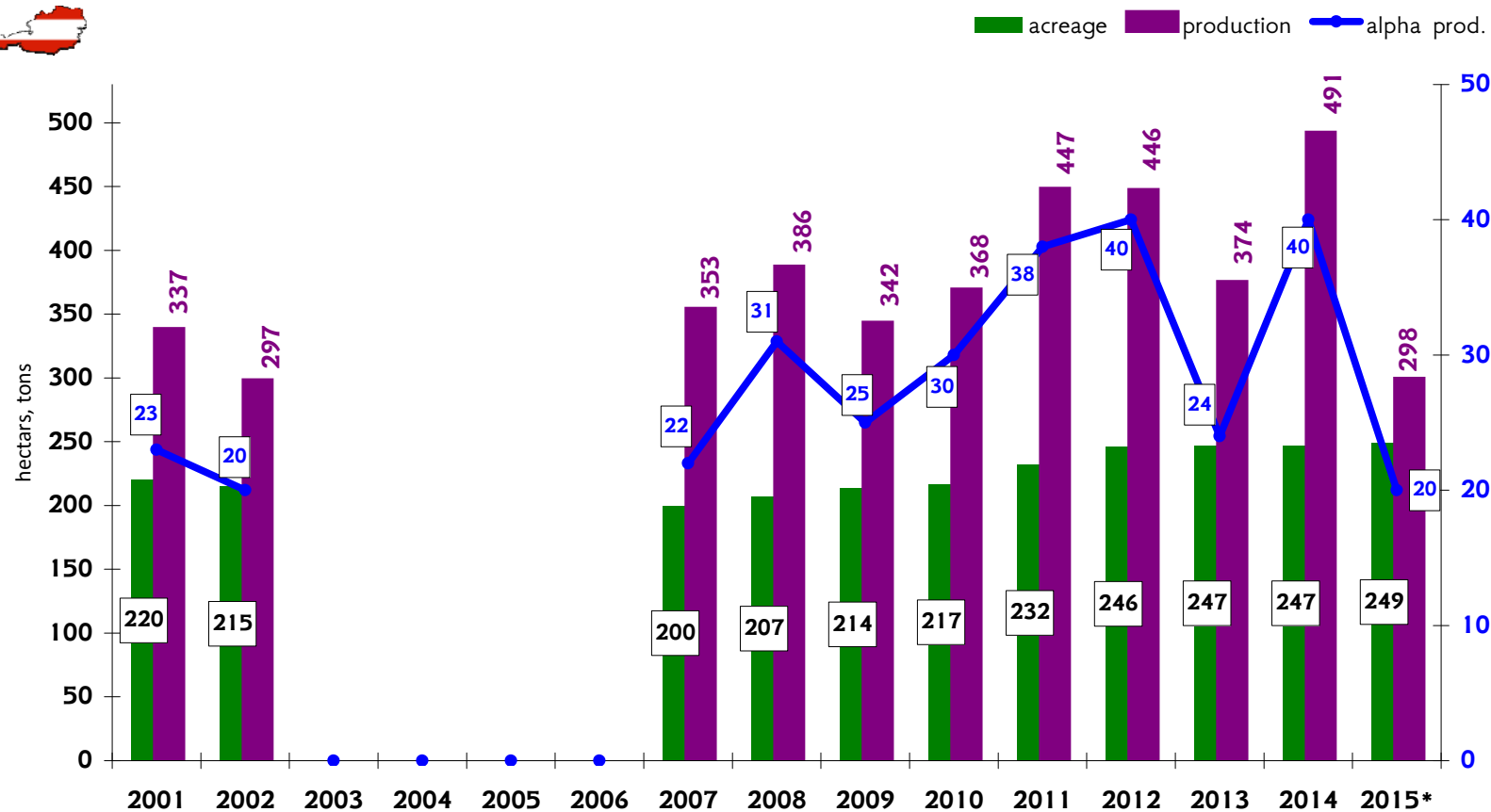
**Figure 2: Australia hop crop 2001 - 2015**

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
acreage	782	862	439	535	449	364	441	484	514	448	455	452	449	408	488
production	2181	2385	1272	1272	1238	1035	890	1189	1343	1099	1044	1093	1138	1079	1201
alpha prod.	281	317	157	157	185	128	117	154	166	144	144	130	143	140	150



**Figure 3: Austria hop crop 2001 - 2015\***

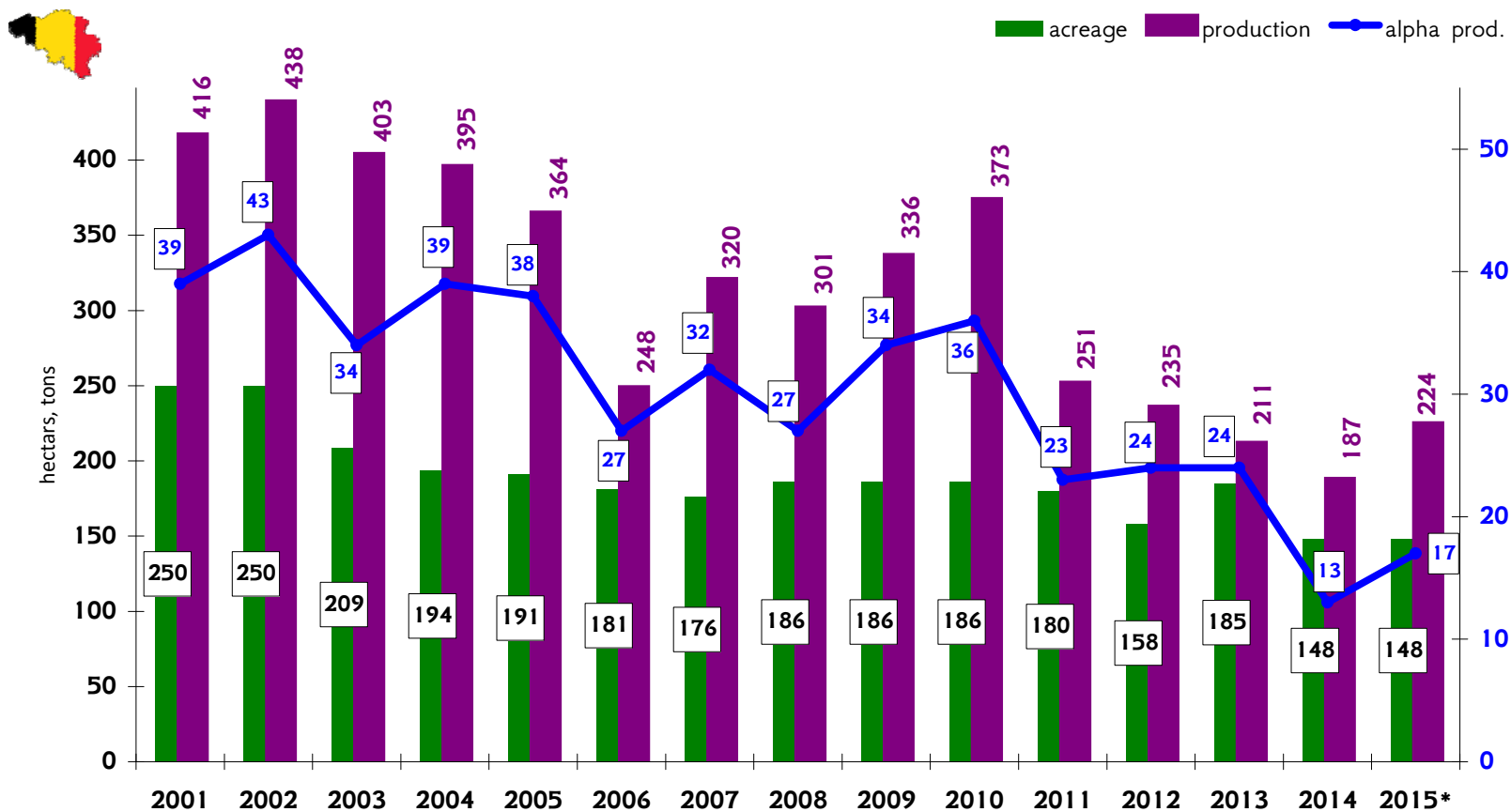
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	220	215	N/A	N/A	N/A	N/A	200	207	214	217	232	246	247	247	249
production	337	297	N/A	N/A	N/A	N/A	353	386	342	368	447	446	374	491	298
alpha prod.	23	20	N/A	N/A	N/A	N/A	22	31	25	30	38	40	24	40	20



\* estimation

**Figure 4: Belgium hop crop 2001 - 2015\***

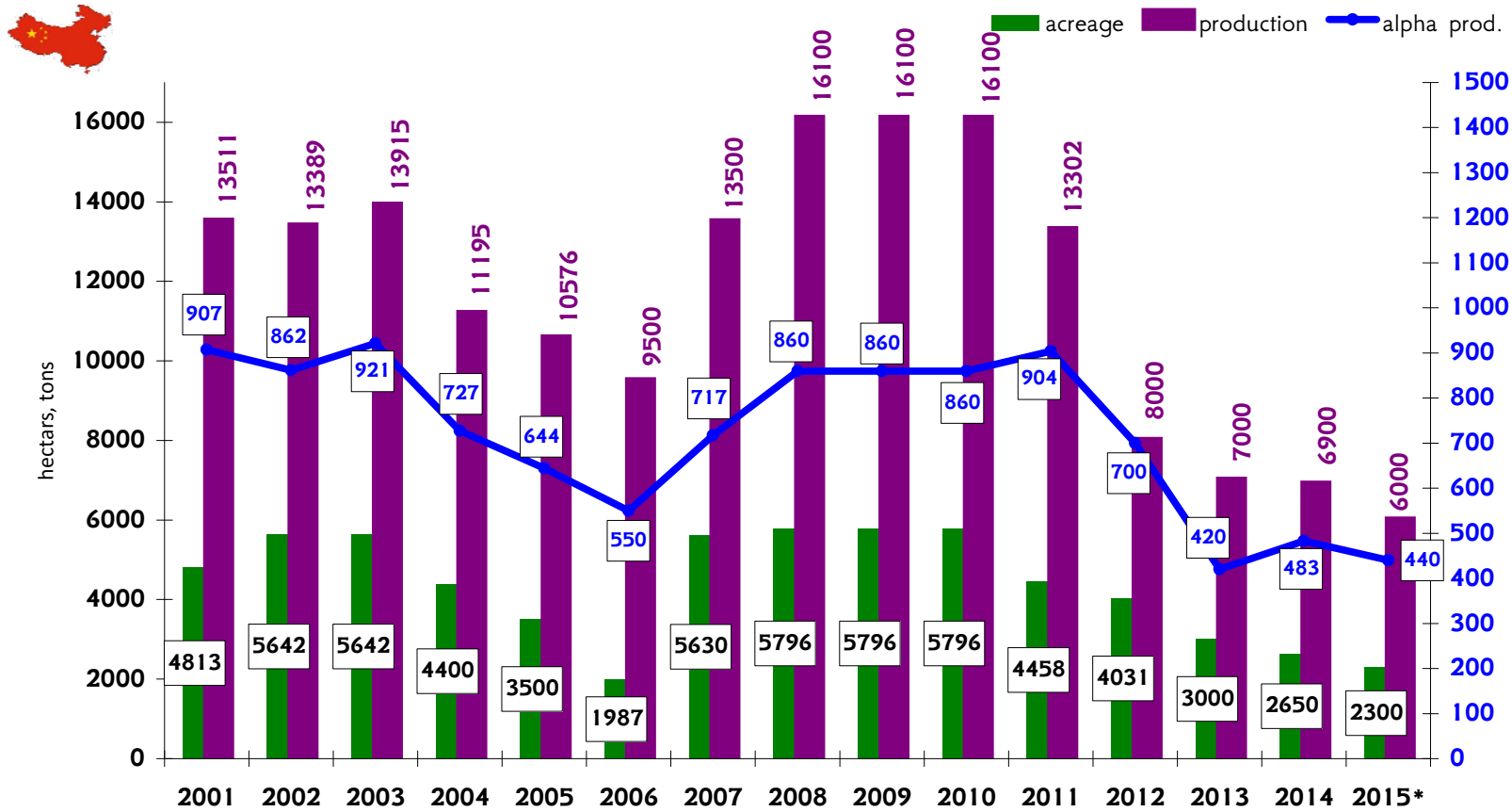
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	250	250	209	194	191	181	176	186	186	186	180	158	185	148	148
production	416	438	403	395	364	248	320	301	336	373	251	235	211	187	224
alpha prod.	39	43	34	39	38	27	32	27	34	36	23	24	24	13	17



\* estimation

Figure 5: China hop crop 2001 - 2015\*

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	4813	5642	5642	4400	3500	1987	5630	5796	5796	5796	4458	4031	3000	2650	2300
production	13511	13389	13915	11195	10576	9500	13500	16100	16100	16100	13302	8000	7000	6900	6000
alpha prod.	907	862	921	727	644	550	717	860	860	860	904	700	420	483	440

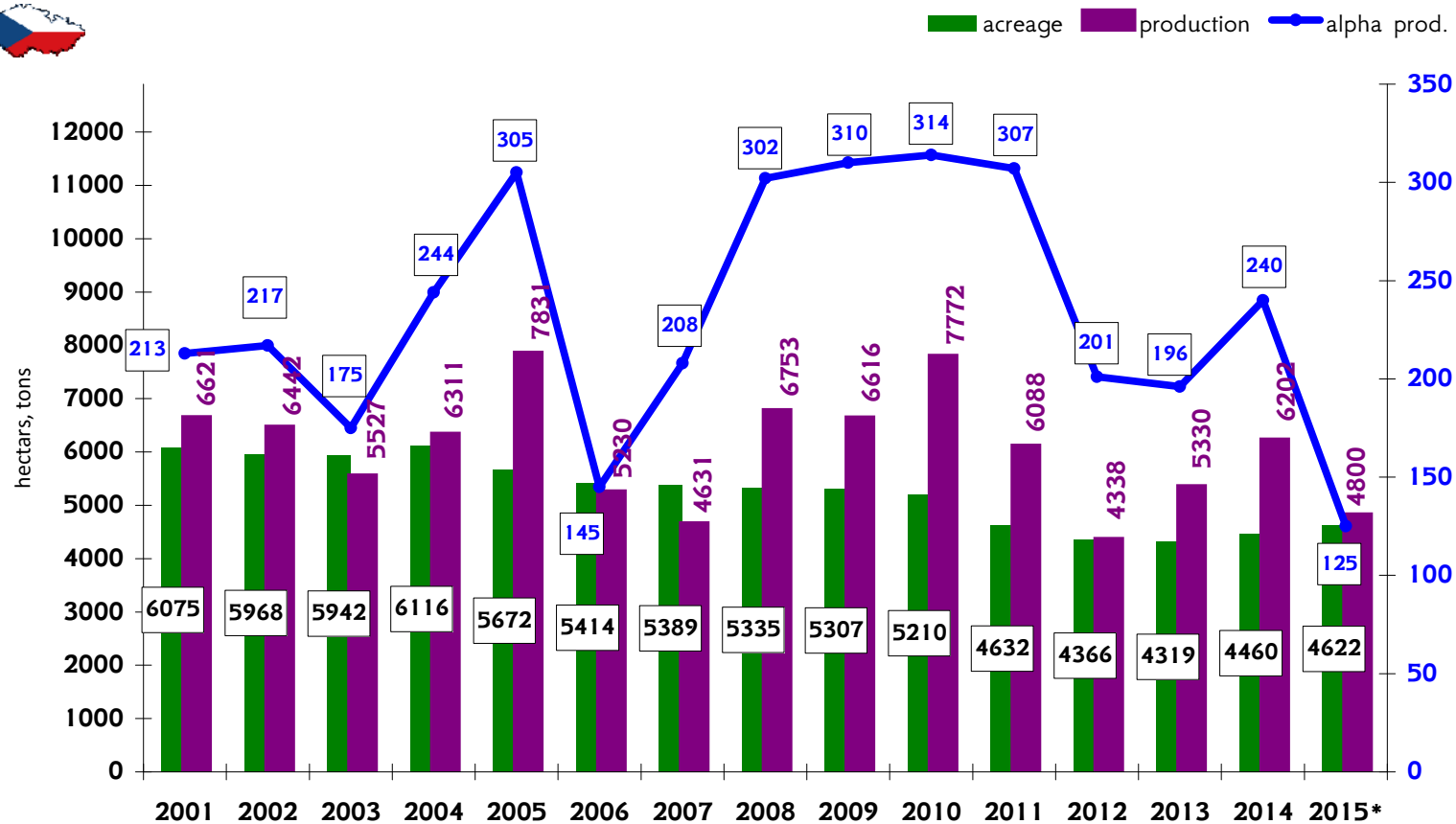


\* estimation



**Figure 6: Czech Republic hop crops and variety development 2001 - 2015\***

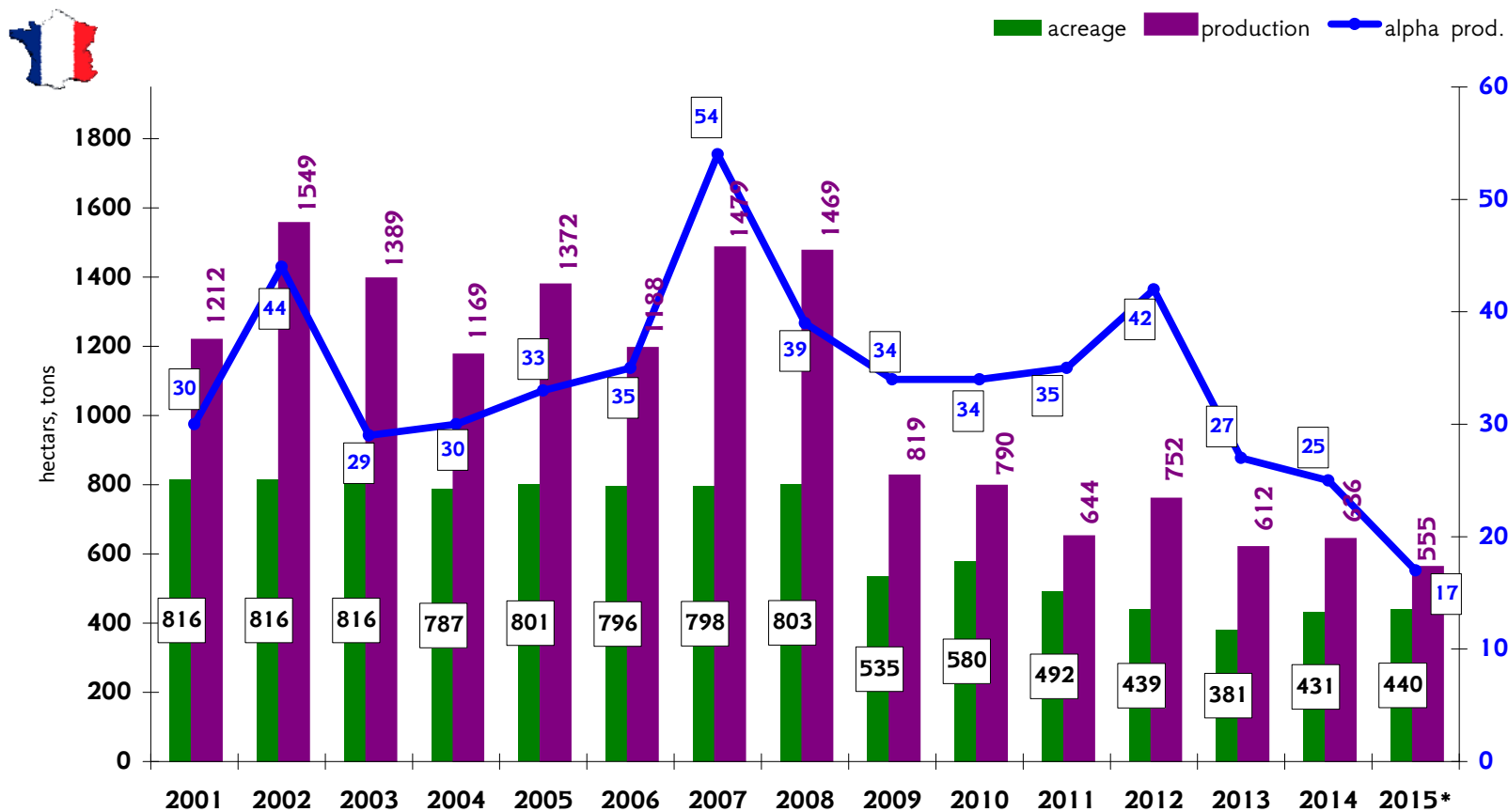
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	6075	5968	5942	6116	5672	5414	5389	5335	5307	5210	4632	4366	4319	4460	4622
production	6621	6442	5527	6311	7831	5230	4631	6753	6616	7772	6088	4338	5330	6202	4800
alpha prod.	213	217	175	244	305	145	208	302	310	314	307	201	196	240	125



\* estimation

**Figure 7: France hop crop development 2001 - 2015\***

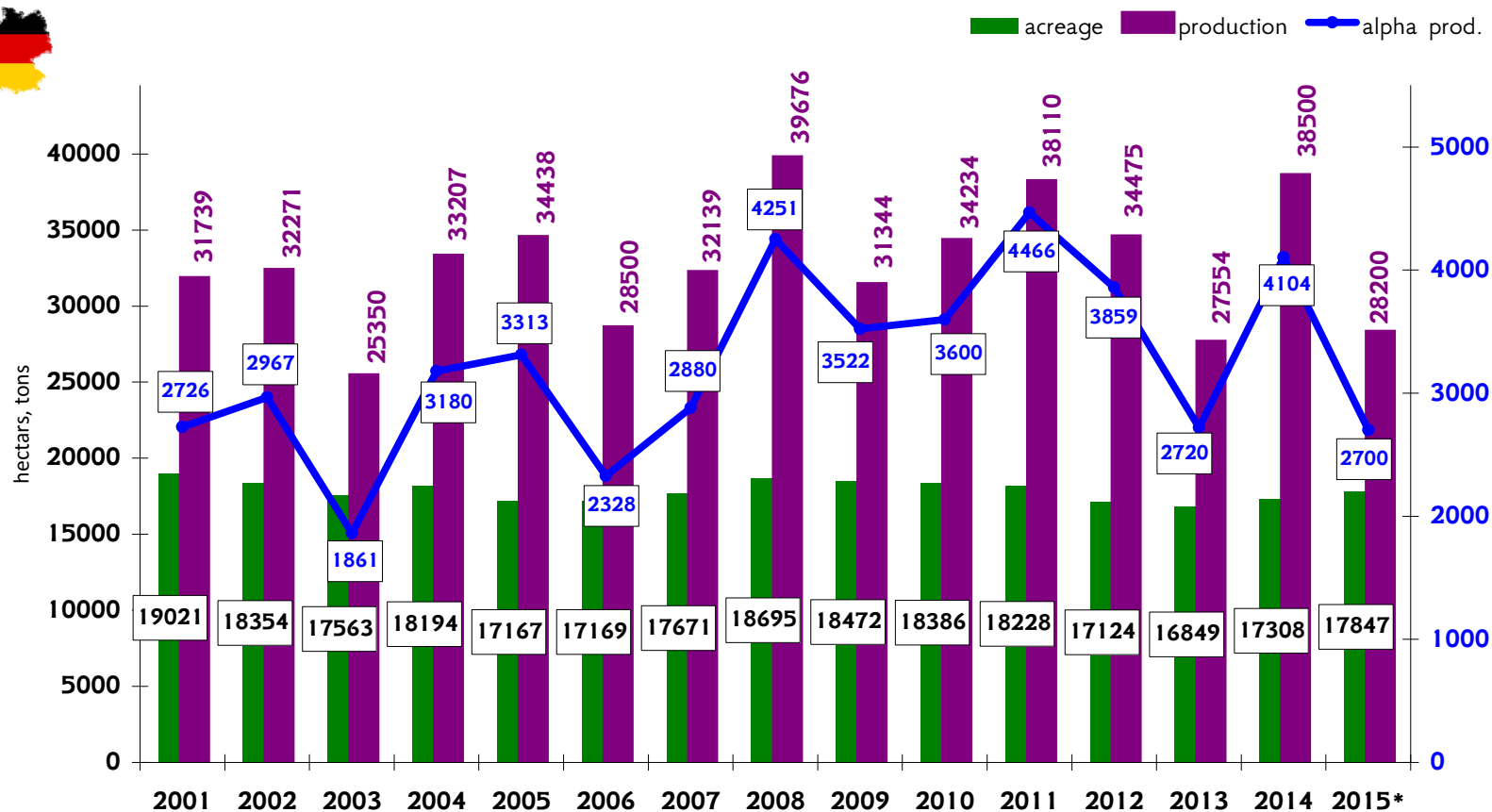
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	816	816	816	787	801	796	798	803	535	580	492	439	381	431	440
production	1212	1549	1389	1169	1372	1188	1479	1469	819	790	644	752	612	636	555
alpha prod.	30	44	29	30	33	35	54	39	34	34	35	42	27	25	17



\* estimation

**Figure 8: Germany hop crop development 2001 - 2015\***

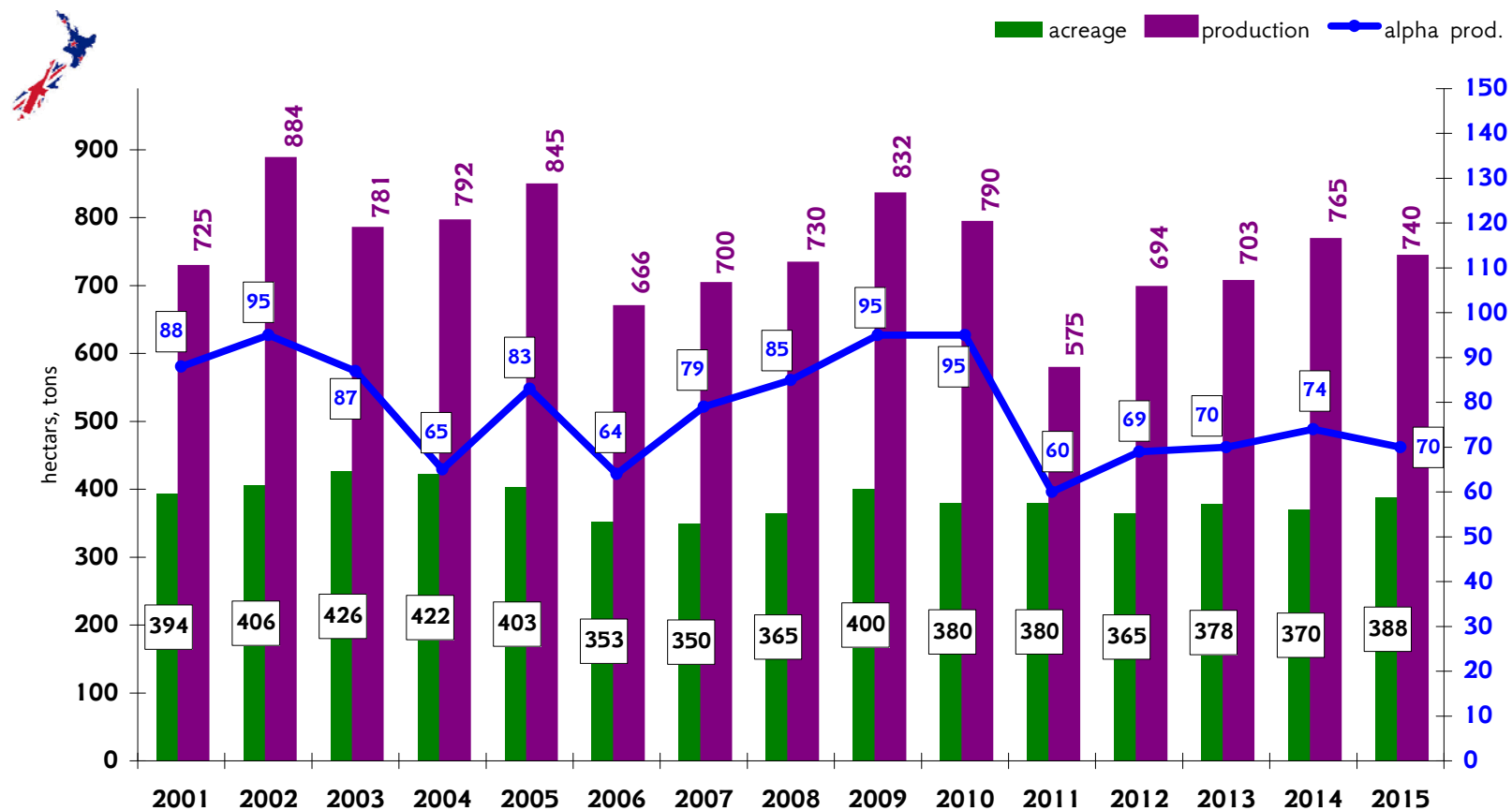
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	19021	18354	17563	18194	17167	17169	17671	18695	18472	18386	18228	17124	16849	17308	17847
production	31739	32271	25350	33207	34438	28500	32139	39676	31344	34234	38110	34475	27554	38500	28200
alpha prod.	2726	2967	1861	3180	3313	2328	2880	4251	3522	3600	4466	3859	2720	4104	2700



\* estimation

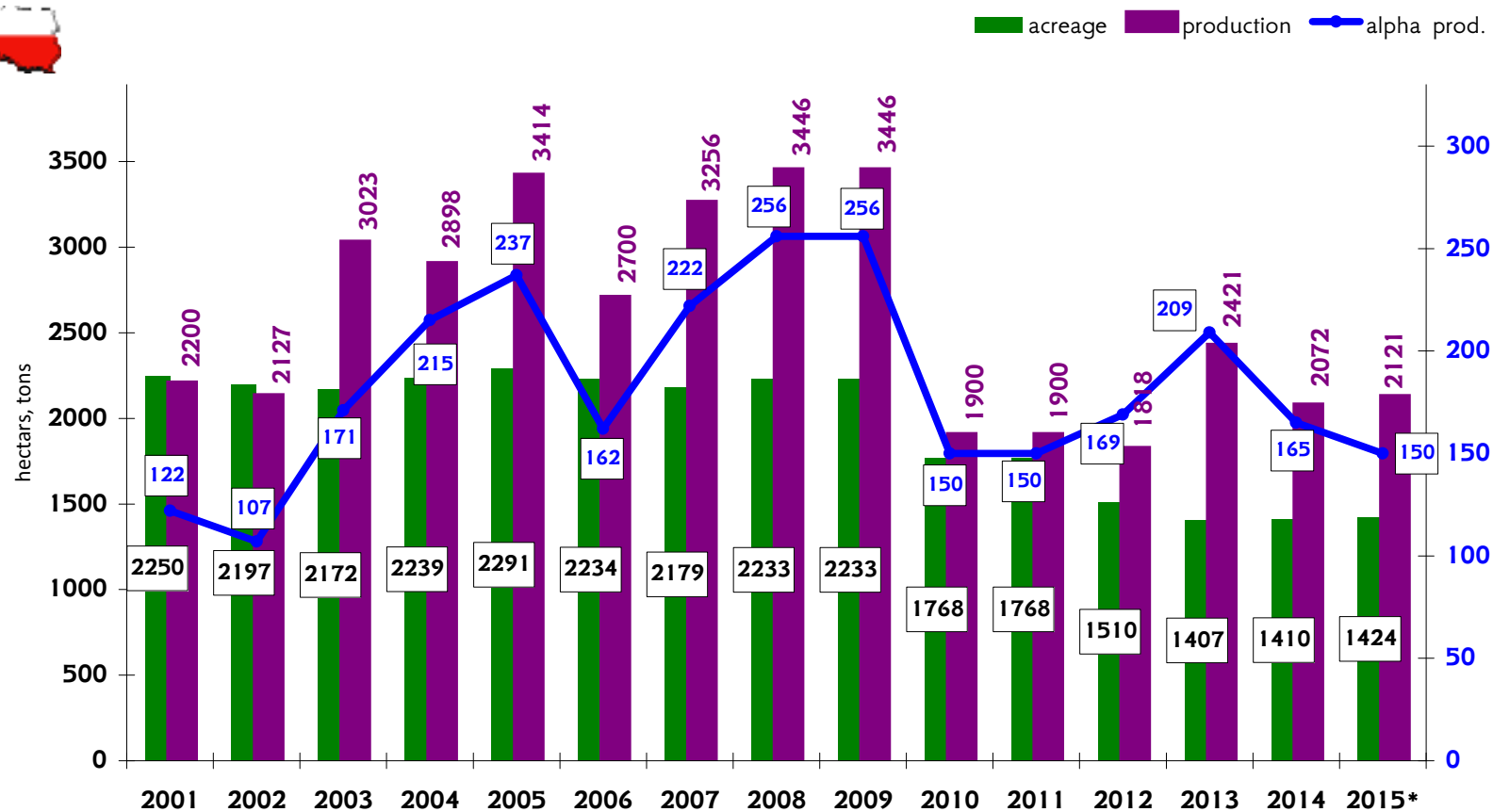
**Figure 9: New Zealand hop crop 2001 - 2015\***

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
acreage	394	406	426	422	403	353	350	365	400	380	380	365	378	370	388
production	725	884	781	792	845	666	700	730	832	790	575	694	703	765	740
alpha prod.	88	95	87	65	83	64	79	85	95	95	60	69	70	74	70



**Figure 10: Poland hop crop development 2001 - 2015\***

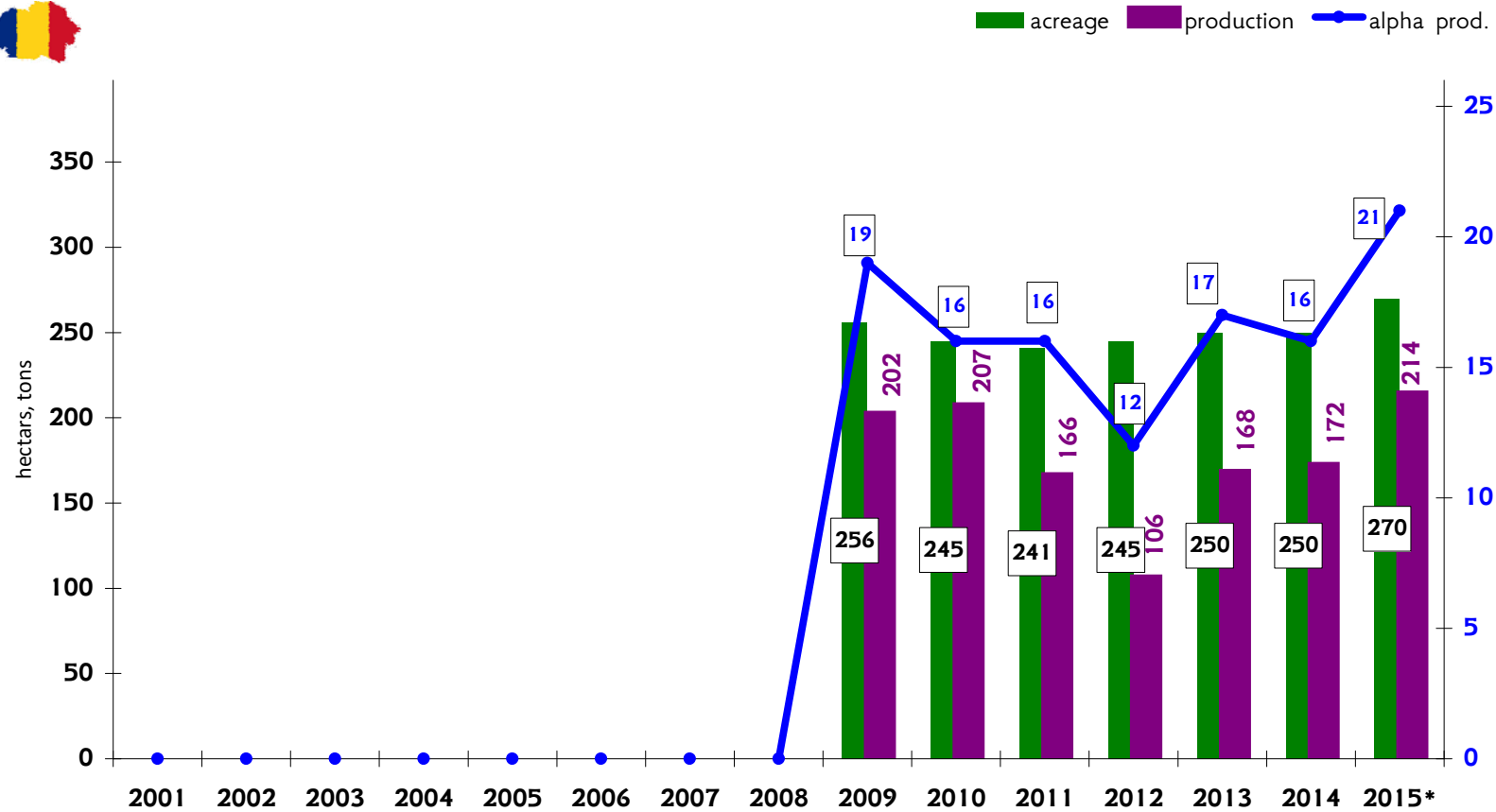
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	2250	2197	2172	2239	2291	2234	2179	2233	2233	1768	1768	1510	1407	1410	1424
production	2200	2127	3023	2898	3414	2700	3256	3446	3446	1900	1900	1818	2421	2072	2121
alpha prod.	122	107	171	215	237	162	222	256	256	150	150	169	209	165	150



\* estimation

**Figure 11: Romania hop crop 2001 - 2015\***

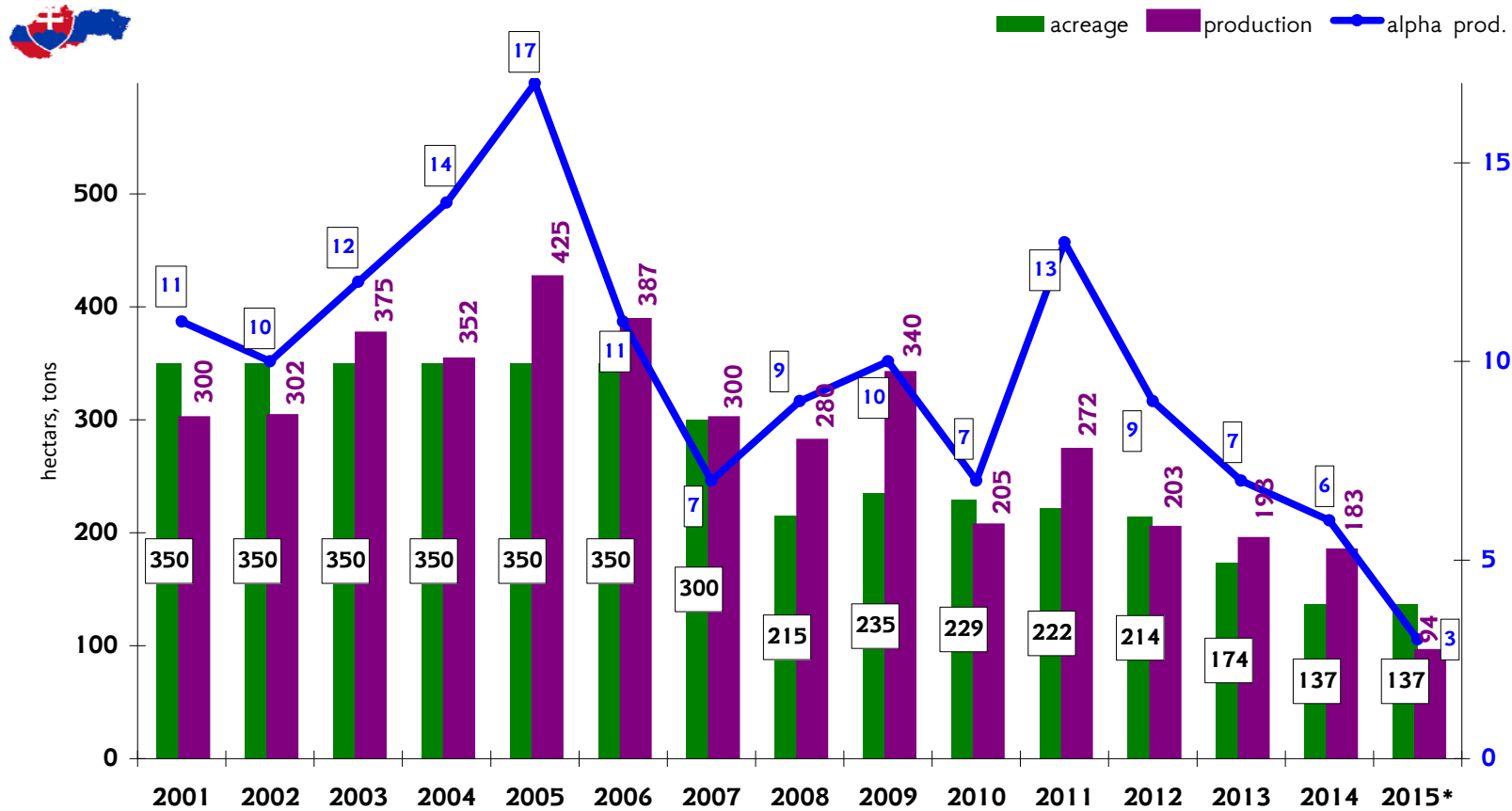
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	256	245	241	245	250	250	270
production	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	202	207	166	106	168	172	214
alpha prod.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	19	16	16	12	17	16	21



\* estimation

Figure 12: Slovakia hop crop 2001 - 2015\*

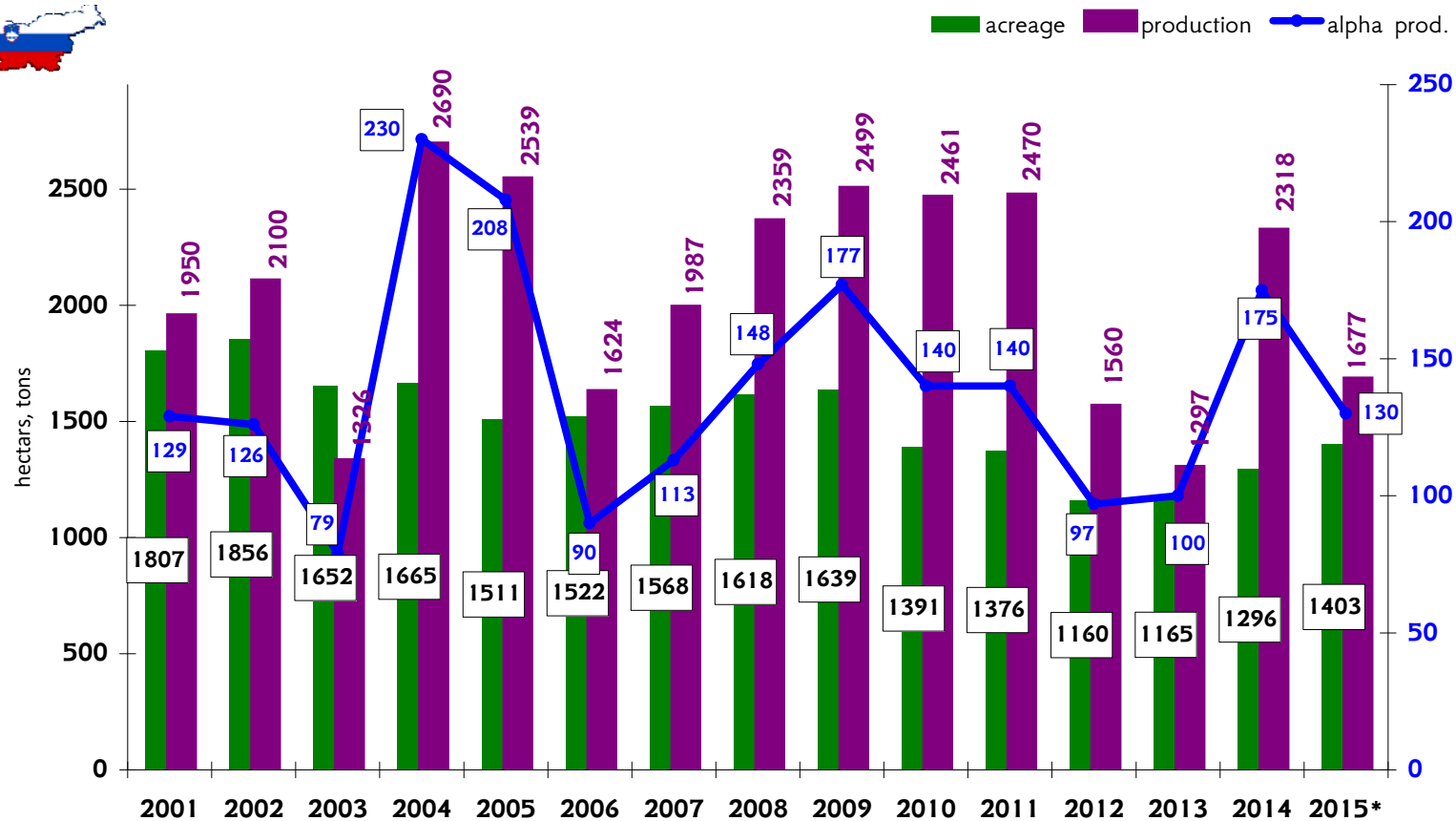
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	350	350	350	350	350	350	300	215	235	229	222	214	174	137	137
production	300	302	375	352	425	387	300	280	340	205	272	203	193	183	94
alpha prod.	11	10	12	14	17	11	7	9	10	7	13	9	7	6	3



\* estimation

**Figure 13: Slovenia hop crop development 2001 - 2015\***

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	1807	1856	1652	1665	1511	1522	1568	1618	1639	1391	1376	1160	1165	1296	1403
production	1950	2100	1326	2690	2539	1624	1987	2359	2499	2461	2470	1560	1297	2318	1677
alpha prod.	129	126	79	230	208	90	113	148	177	140	140	97	100	175	130

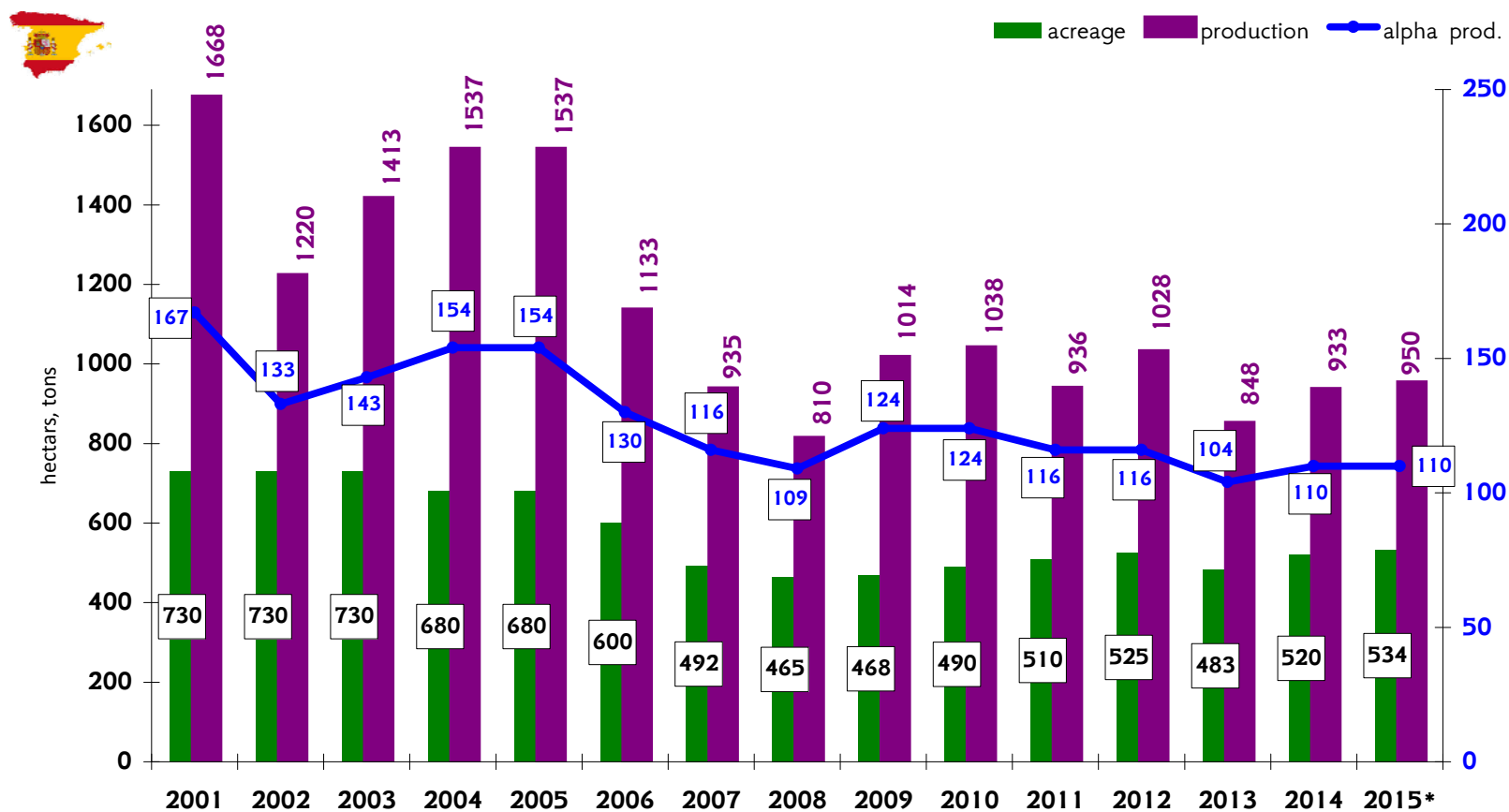


\* estimation



**Figure 14: Spain hop crop 2001 - 2015\***

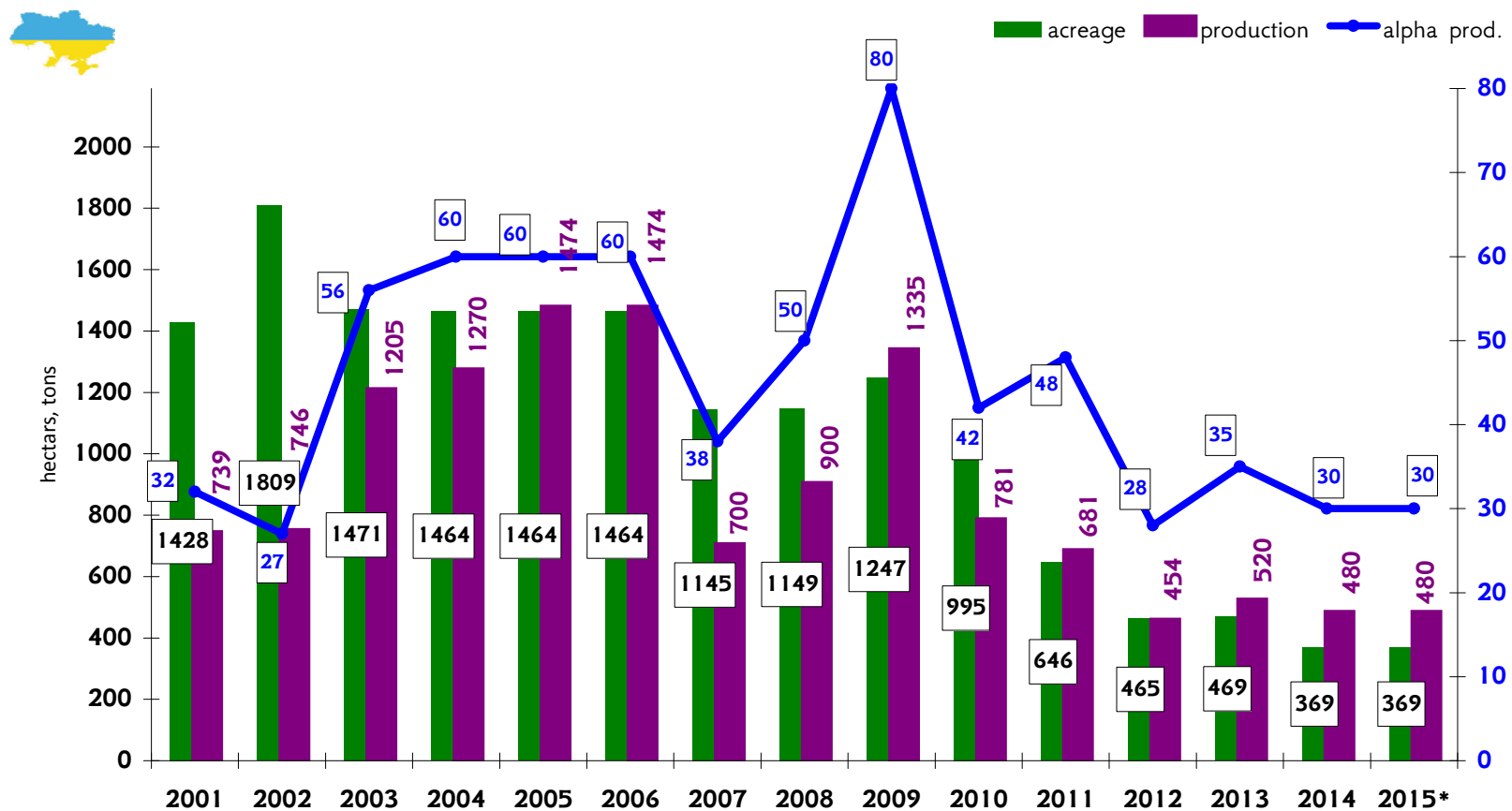
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	730	730	730	680	680	600	492	465	468	490	510	525	483	520	534
production	1668	1220	1413	1537	1537	1133	935	810	1014	1038	936	1028	848	933	950
alpha prod.	167	133	143	154	154	130	116	109	124	124	116	116	104	110	110



\* estimation

Figure 15: Ukraine hop crop 2001 - 2015\*

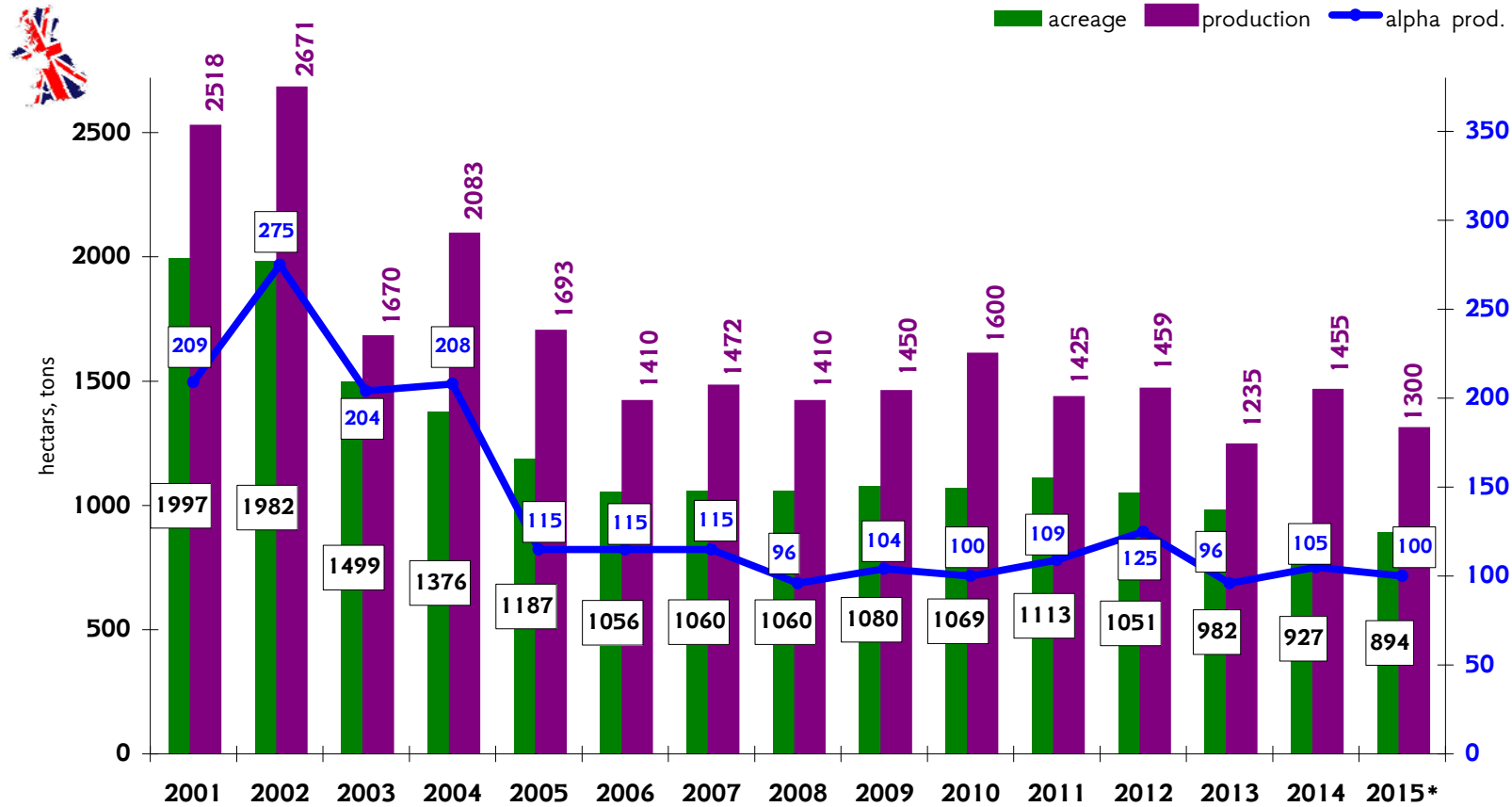
hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	1428	1809	1471	1464	1464	1464	1145	1149	1247	995	646	465	469	369	369
production	739	746	1205	1270	1474	1474	700	900	1335	781	681	454	520	480	480
alpha prod.	32	27	56	60	60	60	38	50	80	42	48	28	35	30	30



\* estimation

**Figure 16: UK-England hop crop 2001 - 2015\***

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	1997	1982	1499	1376	1187	1056	1060	1060	1080	1069	1113	1051	982	927	894
production	2518	2671	1670	2083	1693	1410	1472	1410	1450	1600	1425	1459	1235	1455	1300
alpha prod.	209	275	204	208	115	115	115	96	104	100	109	125	96	105	100



\* estimation

**Figure 17: USA hop crop development 2001 - 2015\***

hop crop	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015*
acreage	14536	11776	11314	11232	11817	11912	12509	16551	16076	12645	12054	12923	14254	15382	18307
production	30315	26461	24750	25040	23494	24410	26757	36574	42946	29707	29385	27782	31454	32204	36380
alpha prod.	3450	3140	2900	2900	2584	2929	3280	4150	4690	4026	3700	3230	3680	3541	3856

