



2025 STATISTICAL REPORT

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PRESENTED BY HOP GROWERS OF AMERICA

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EXECUTIVE SUMMARY

In 2025 the Pacific Northwest eliminated an additional 3,139 acres to relieve surplus pressure, revealing a total acreage decline of 32% since 2021. Despite severe market corrections and vast stretches of idled acreage, in 2025 the hops remained unfazed by the economics. Nourished by abundant sunshine inherent to long summer days in a growing season largely absent from extreme heat events or pest pressure, the Pacific Northwest boasted a crop with average yields of 1,996 pounds per acre bearing distinctly high oil content and exceptional aromatic quality reported by USDA-NASS at 83.1 million pounds, a 4.5% decrease from 2024.

Years of drastic cuts to several aroma varieties have led to a handful of upticks in acreage for specific cultivars in 2025, notably Citra® HBC 394 which remained the leading variety with 7,581 acres and embodied a 12% increase from 2024. Mosaic® HBC 369 shifted to fourth place with a slight 3% decrease at 3,488 total acres, with Simcoe® YCR 14 ascending to 3rd place with stable acreage. Centennial rose to 5th place with 2,539 acres and Cascade moved to 6th place with 2,206 acres. CTZ remained in second place with 4,890 acres, taking a 10% cut. HBC 682 maintained 7th place despite an over 16% decrease to 2,059 acres. Though acreage for Helios™ was not itemized in the 2025 USDA-NASS National Hop Report due to the limited number of growers cultivating the variety, estimations released by S.S. Steiner would affirm Helios™ remaining in 9th place with 1,198 acres representing a 36% decrease.

Washington production represented 74.7% of the Pacific Northwest production, followed by Idaho with 14% and Oregon with 11.3%.

Conversions used while compiling the data presented in this document:

1 hectare = 2.4711 acres

1 acre = 0.404686 hectares

1 kilogram = 2.2046 pounds

1 pound = 0.4536 kilograms

1 metric tonne = 2204.6 pounds

1 hectoliter = 26.417 gallons

1 zentner = 110.23 pounds

TOP 10 HOP VARIETIES (WITH ACREAGE)

	2020	2021	2022	2023	2024	2025
1	Citra®, HBC 394 (10,997)	Citra®, HBC 394 (11,981)	Citra®, HBC 394 (12,044)	Citra®, HBC 394 (8,856)	Citra®, HBC 394 (6,775)	Citra®, HBC 394 (7,581)
2	CTZ (6,286)	Mosaic®, HBC 369 (6,417)	Mosaic®, HBC 369 (6,501)	CTZ (6,354)	CTZ (5,438)	CTZ (4,890)
3	Mosaic®, HBC 369 (5,496)	CTZ (5,569)	Cascade (5,107)	Mosaic®, HBC 369 (5,276)	Mosaic®, HBC 369 (3,607)	Simcoe®, YCR 14 (3,490)
4	Simcoe®, YCR 14 (4,113)	Cascade (4,328)	CTZ (4,518)	Cascade (4,484)	Simcoe®, YCR 14 (3,417)	Mosaic®, HBC 369 (3,488)
5	Cascade (4,038)	Simcoe®, YCR 14 (4,007)	Simcoe®, YCR 14 (4,462)	Simcoe®, YCR 14 (4,206)	Cascade (3,082)	Centennial (2,539)
6	Centennial (2,933)	Centennial (2,342)	Centennial (2,424)	Centennial (2,489)	Centennial (2,448)	Cascade (2,206)
7	HBC 682 (2,208)	HBC 682 (2,114)	Chinook (2,075)	HBC 682 (2,226)	HBC 682 (2,429)	HBC 682 (2,059)
8	Amarillo®, VGXP01 (2,149)	Amarillo®, VGXP01 (1,907)	Amarillo®, VGXP01 (1,913)	Amarillo®, VGXP01 (2,177)	Amarillo®, VGXP01 (2,015)	Amarillo®, VGXP01 (1,874)
9	Chinook (1,893)	Chinook (1,774)	HBC 682 (1,709)	Chinook (1,701)	Helios™, HS15619 (1,890)	Chinook (1,057)
10	El Dorado® (1,584)	El Dorado® (1,734)	El Dorado® (1,165)	Helios™, HS15619 (1,509)	Chinook (1,260)	Pekko®, ADHA-871 (834)
	Top Ten 41,697	Top Ten 42,173	Top Ten 41,918	Top Ten 39,278	Top Ten 32,361	Top Ten 30,018
	Other 16,944	Other 18,699	Other 17,867	Other 16,432	Other 12,432	Other 11,636
	Total 58,641	Total 60,872	Total 59,785	Total 55,710	Total 44,793	Total 41,654
	Top Ten 71.1%	Top Ten 69.3%	Top Ten 70.1%	Top Ten 70.5%	Top Ten 72.2%	Top Ten 72.1%

Year	Acres Harvested	Production (pounds)	Yield	Value of Production (\$1,000)	Gross Return per acre*
2018	55,035	106,906,700	1,943	\$583,444	\$10,601
2019	56,544	112,041,200	1,981	\$636,580	\$11,258
2020	58,641	103,810,300	1,770	\$619,424	\$10,563
2021	60,872	115,630,900	1,900	\$661,618	\$10,869
2022	60,113	101,286,300	1,694	\$621,098	\$10,332
2023	54,318	104,042,500	1,915	\$562,146	\$10,349
2024	44,793	87,072,200	1,944	\$445,805	\$9,953
2025	41,654	83,143,400	1,996	\$447,475	\$10,743

Source: USDA-NASS, prepared by HGA.

Growers have faced substantial increases in the cost of production, driven by expansion of harvesting and production capacity to handle a doubling of acreage between 2012 and 2021, updating equipment, increased labor costs (including health care and other benefits), and inflation in the cost of production inputs. Administrative and operating costs associated with food safety, best practices compliance and other customer requirements have also increased.

Washington State University updated the Pacific Northwest Hop Cost of Production Study in 2020, estimating the annual cost of producing mature standard trellis hops under drip irrigation in the Pacific Northwest at \$13,588 per acre (including variable and fixed costs, depreciation, etc.) – see <https://www.usahops.org/growers/cost-of-production.html>.

U.S. HOP ACREAGE BY STATE AND VARIETY (FIVE YEARS)

STATE & VARIETY	ACRES HARVESTED				2025	2024-2025
	2021	2022	2023	2024		% +/-
IDAHO						
Amarillo®, VGXP01	380	379	537	514	503	-2.14%
Apollo™	*	*	209	210	*	
Cascade	479	845	699	324	*	
Cashmere	124	140	91	*	*	
Chinook	521	542	409	192	*	
Citra®, HBC 394	1,743	1,767	1,014	609	729	19.70%
Columbus/Tomahawk®/Zeus	1,046	520	1,059	811	775	-4.44%
Comet	146	144	108	*	*	
El Dorado®	621	304	242	*	*	
Elani™, YQH1320	*	*	8	8	8	0.00%
Eureka!™	332	419	525	374	*	
Hallertauer Mittelfrüher	159	159	159	160	44	-72.50%
Helios™, HS15619	*	*	503	511	*	
Idaho 7®	592	382	290	243	260	7.00%
Mosaic®, HBC 369	1,380	1,440	1,120	495	558	12.73%
Mt. Rainier	84	85	66	*	*	
Northern Brewer	58	*	*	*	*	
Saaz	330	380	380	372	84	-77.42%
Simcoe®, YCR 14	388	441	257	97	97	0.00%
Triumph	72	55	*	*	*	
Willamette	389	459	459	158	158	0.00%
Experimental	*	*	*	31	*	
Other Varieties	850	1,100	510	688	1,886	174.13%
TOTAL IDAHO	9,694	9,561	8,645	5,797	5,102	-11.99%
OREGON						
Amarillo®, VGXP01	193	210	204	227	213	-6.17%
Cascade	666	658	629	487	487	0.00%
Centennial	364	380	386	422	417	-1.18%
Chinook	79	90	76	62	103	66.13%
Citra®, HBC 394	1,472	1,691	1,528	1,260	1,525	21.03%
Crystal	159	191	240	228	160	-29.82%
Golding	78	*	*	*	*	
Liberty	54	*	25	25	*	
Mosaic®, HBC 369	844	901	847	653	684	4.75%
Mt. Hood	123	171	188	142	118	-16.90%
Mt. Rainier	126	130	109	*	*	
Nugget	572	441	375	252	157	-37.70%
Sabro®, HBC 438	225	119	*	*	*	
Simcoe®, YCR 14	499	527	466	447	431	-3.58%
Sterling	58	35	30	45	44	-2.22%
Strata™, OR 91331	833	1,143	839	574	326	-43.21%
Super Galena™	*	*	*	*	*	
Tahoma	*	*	104	*	*	
Talus®, HBC 692	*	46	*	*	*	
Willamette	446	471	439	266	227	-14.66%

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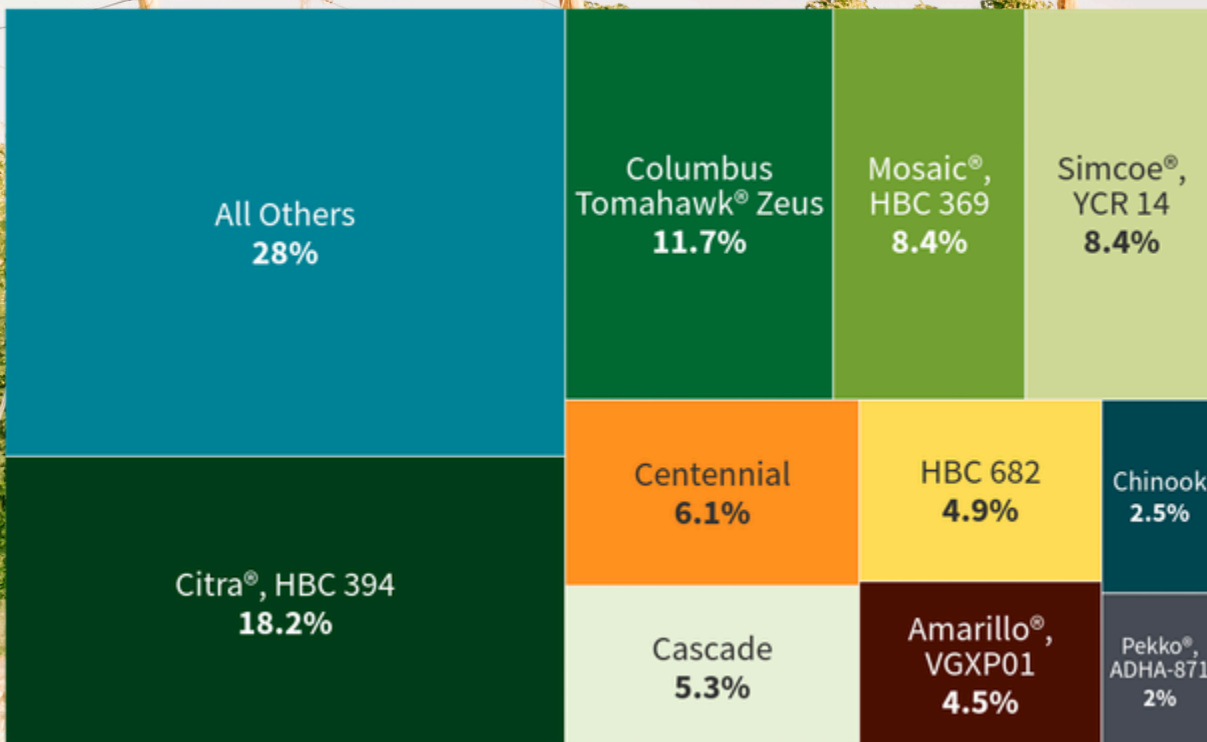
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STATE & VARIETY	ACRES HARVESTED					2024-2025
	2021	2022	2023	2024	2025	% +/-
OREGON CONTINUED						
Experimental	*	*	*	*	33	
Other Varieties	604	586	337	545	429	-21.28%
TOTAL OREGON	7,395	7,790	6,822	5,635	5,354	-4.99%
WASHINGTON						
Ahtanum®, YCR 1	166	168	*	*	*	
Amarillo®, VGXP01	1,334	1,324	1,436	1,274	1,158	-9.11%
Apollo™	*	807	802	870	522	-40.00%
Azacca®, ADHA-483	730	871	401	367	*	
Bravo™	238	203	206	143	114	-20.28%
Calypso™	*	*	*	*	*	
Cascade	3,183	3,604	3,156	2,271	1,719	-24.31%
Cashmere	690	717	258	140	186	32.86%
Centennial	1,978	2,044	2,103	2,026	2,122	4.74%
Chinook	1,174	1,443	1,216	1,006	954	-5.17%
Citra®, HBC 394	8,766	8,586	6,314	4,906	5,327	8.58%
Cluster	390	286	195	270	217	-19.63%
Columbus/Tomahawk®/Zeus	4,523	3,998	5,295	4,627	4,115	-11.07%
Comet	386	327	175	159	209	31.45%
Ekuanot™, HBC 366	381	367	373	433	316	-27.02%
El Dorado®	1,113	861	621	565	434	-23.19%
Elani™, YQH1320	*	*	61	58	78	34.48%
Eureka!™	466	570	621	479	401	-16.28%
Galena	*	*	*	*	*	
HBC 682	2,114	1,709	2,226	2,429	2,059	-15.23%
Helios™, HSI5619	*	*	1,006	1,379	*	
Idaho 7®	388	158	148	150	150	0.00%
Jarrylo™, ADHA-881	*	*	*	*	*	
Krush™, HBC 586					331	
Loral®, HBC 291	197	199	161	106	*	
Mosaic®, HBC 369	4,193	4,160	3,309	2,459	2,246	-8.66%
Mt. Hood	*	42	*	*	51	
Mt. Rainier	209	212	212	*	*	
Palisade®, YCR-4	333	377	260	315	*	
Pekko®, ADHA-871	1,070	1,084	1,045	*	834	
Sabro®, HBC 438	1,120	548	203	204	181	-11.27%
Simcoe®, YCR 14	3,172	3,494	3,483	2,873	2,962	3.10%
Summit™	437	*	*	*	*	
Super Galena™	480	354	354	355	233	-34.37%
Tahoma	388	383	385	121	*	
Talus®, HBC 692	*	377	147	95	492	417.89%
Warrior®, YCR 5	128	147	148	147	*	
Willamette	132	124	199	173	199	15.03%
Zappa™	*	69	*	*	*	
Experimental	575	702	602	411	322	-21.65%
Other Varieties	3,329	2,447	1,730	2,550	3,266	28.08%
TOTAL WASHINGTON	43,783	42,762	38,851	33,361	31,198	-6.48%
TOTAL PACIFIC NORTHWEST	60,872	60,113	54,318	44,793	41,654	-7.01%

SOURCE: USDA-NASS. Prepared by HGA. State and variety acreage for production outside of the Pacific Northwest are not reported.

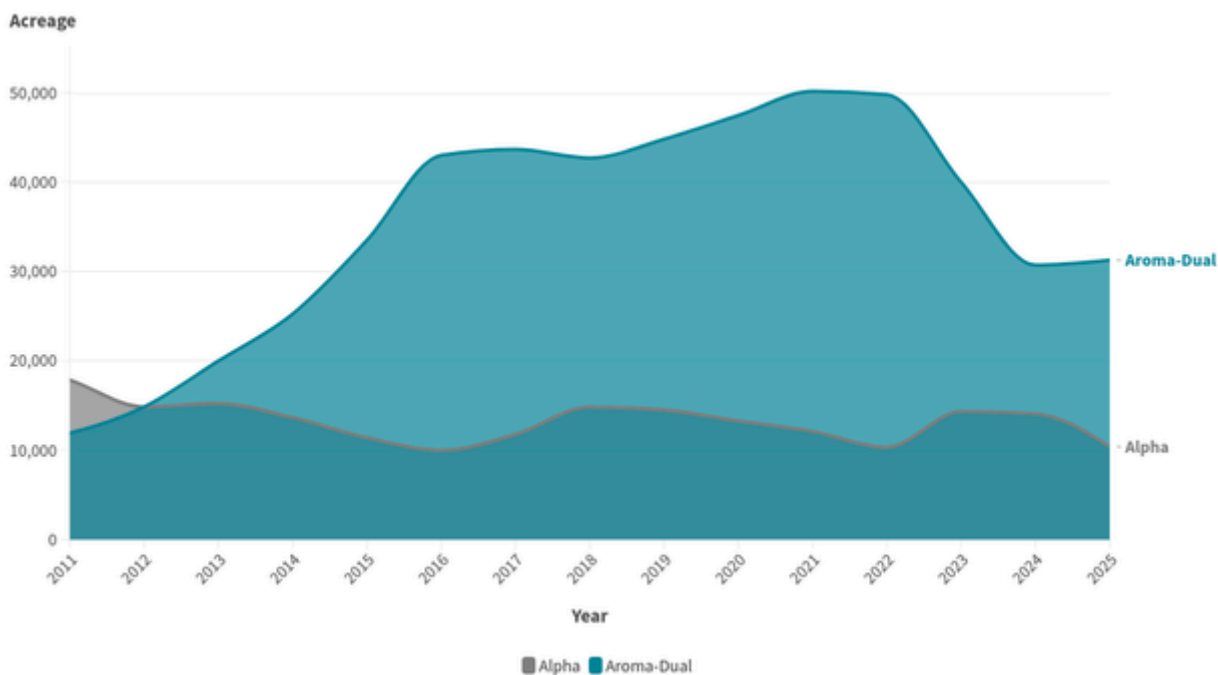
"Other Varieties" includes data to avoid disclosure of individual operations

MAJOR HOP VARIETIES – 2025 (% OF ACREAGE)



Source: USDA-NASS, prepared by HGA.

U.S. HOP ACREAGE – AROMA/DUAL PURPOSE VS. ALPHA

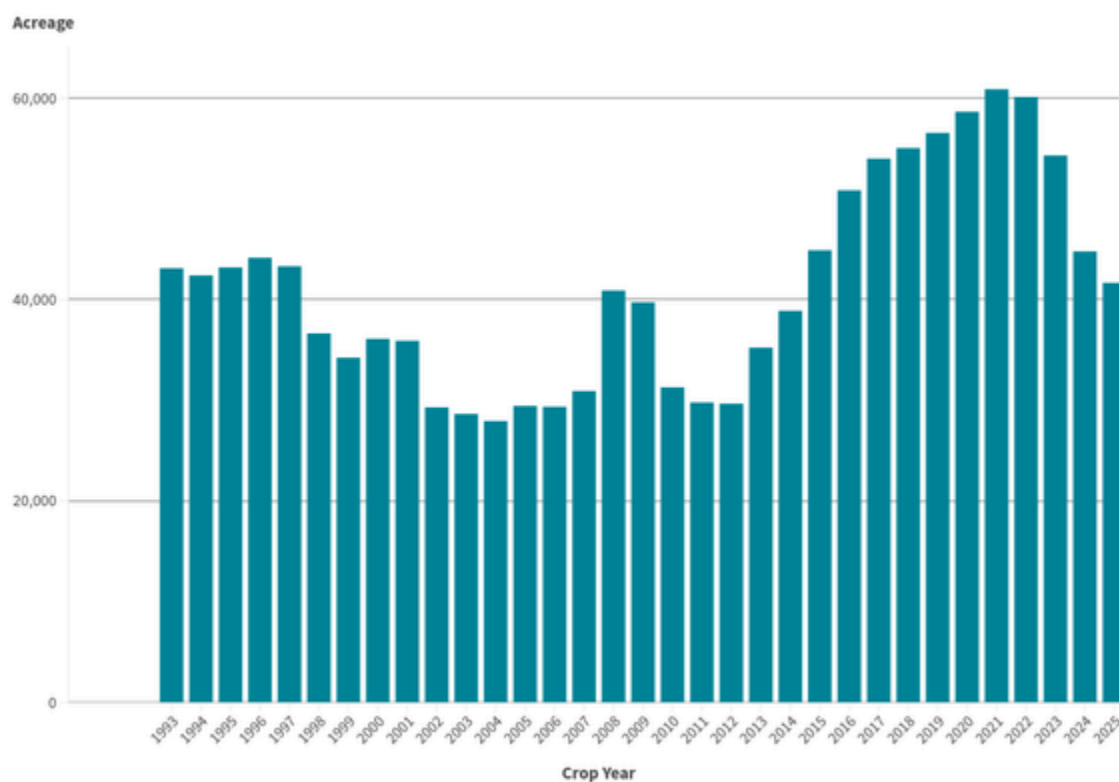


U.S. HOP ACREAGE BY STATE (10 YEARS)

YEAR	ACREAGE HARVESTED			TOTAL
	WASHINGTON	OREGON	IDAHO	
2016	37,444	7,765	5,648	50,857
2017	38,648	8,216	7,125	53,989
2018	39,170	7,725	8,140	55,035
2019	40,880	7,306	8,358	56,544
2020	42,269	7,104	9,268	58,641
2021	43,783	7,395	9,694	60,872
2022	42,762	7,790	9,561	60,113
2023	38,851	6,822	8,645	54,318
2024	33,361	5,635	5,797	44,793
2025	31,198	5,354	5,102	41,654

Source: USDA-NASS, prepared by HGA.

U.S. HOP ACREAGE (1993-2025)



SOURCE: USDA-NASS and HGA Hop Acreage Reports

HOP YIELDS BY STATE AND VARIETY (FIVE YEARS)

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2024-2025
	2021	2022	2023	2024	2025	% +/-
IDAHO						
Amarillo®, VGXP01	1,813	1,458	1,589	1,891	1,913	0.05%
Apollo™	*	*	2,744	2,709	*	
Bravo™	*	*	*	*	*	
Calypso™	*	*	*	*	*	
Cascade	1,559	1,494	1,957	2,136	*	
Cashmere	1,828	1,622	1,321	*	*	
Chinook	2,104	1,467	2,047	1,903	*	
Citra®, HBC 394	1,413	1,515	1,581	1,579	1,631	0.07%
Columbus/Tomahawk®/Zeus	3,169	3,027	2,638	3,336	3,402	0.03%
Comet	1,663	1,863	1,877	*	*	
El Dorado®	1,778	1,766	2,256	*	*	
Elani™, YQH1320	*	*	1,158	2,673	2,657	0.04%
Eureka!™	2,552	2,200	2,308	2,592	*	
Hallertauer Mittelfrüher	1,272	1,649	1,085	1,693	1,474	0.05%
Helios™, HSI5619	*	*	1,736	3,092	*	
Idaho 7®	2,837	2,588	2,572	2,680	2,885	0.04%
Mosaic®, HBC 369	2,141	2,103	2,442	2,644	2,524	0.04%
Mt. Rainier	985	1,364	1,572	*	*	
Northern Brewer	1,266	*	*	*	*	
Saaz	620	955	524	813	1,222	0.18%
Simcoe®, YCR 14	1,121	1,208	1,312	1,392	1,425	0.07%
Triumph	1,063	871	*	*	*	
Willamette	1,311	1,393	1,440	1,501	1,462	0.06%
Experimental	*	*	*	1,691	*	
Other Varieties	1,725	1,587	1,778	2,013	2,191	0.05%
Total Idaho	1,900	1,734	1,949	2,273	2,281	0.04%
OREGON						
Amarillo®, VGXP01	2,186	1,870	1,841	1,727	2,064	0.07%
Cascade	1,595	1,578	1,633	1,634	1,623	0.06%
Centennial	1,384	1,575	1,057	1,459	1,400	0.07%
Chinook	1,794	1,543	1,453	1,510	1,731	0.08%
Citra®, HBC 394	1,414	1,562	1,290	1,698	1,678	0.06%
Crystal	1,816	1,739	1,422	1,432	1,633	0.08%
Golding	927	*	*	*	*	
Liberty	1,506	*	835	1,233	*	
Mosaic®, HBC 369	2,077	2,059	1,907	2,203	2,355	0.05%
Mt. Hood	1,624	1,252	1,373	1,548	1,925	0.08%
Mt. Rainier	1,389	1,473	1,497	*	*	
Nugget	2,162	2,085	2,236	2,268	2,000	0.04%
Sabro®, HBC 438	1,749	1,996	*	*	*	
Simcoe®, YCR 14	1,643	1,646	1,225	1,337	1,314	0.07%
Sterling	1,321	1,559	1,859	1,451	1,452	0.07%
Strata™ OR 91331	1,889	2,000	1,617	1,961	2,128	0.06%
Tahoma	*	*	1,884	*	*	
Talus®, HBC 692	*	1,483	*	*	*	
Willamette	1,461	1,489	1,524	1,465	1,631	0.08%
Experimental	*	*	*	*	1,629	
Other Varieties	1,780	1,567	1,934	1,757	1,645	0.05%
Total Oregon	1,705	1,729	1,558	1,732	1,759	0.06%

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STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2024-2025
	2021	2022	2023	2024	2025	% +/-
WASHINGTON						
Ahtanum®, YCR 1	2,211	2,032	*	*	*	
Amarillo®, VGXP01	1,659	1,486	1,686	1,419	1,725	0.09%
Apollo™	*	2,483	2,989	2,682	2,822	0.04%
Azacca®, ADHA-483	1,909	1,559	1,980	2,020	*	
Bravo™	2,759	2,161	2,896	2,711	3,029	0.04%
Calypso™	2,930	*	*	*	*	
Cascade	1,585	1,477	1,957	1,839	2,028	0.06%
Cashmere	1,395	1,521	1,949	1,695	1,735	0.06%
Centennial	1,585	1,464	1,191	1,621	1,543	0.06%
Chinook	1,851	1,335	1,812	1,722	1,873	0.06%
Citra®, HBC 394	1,580	1,365	1,585	1,573	1,641	0.07%
Cluster	2,016	1,505	1,722	1,855	2,114	0.06%
Columbus/Tomahawk®/Zeus	2,656	2,256	2,465	2,496	2,622	0.04%
Comet	1,632	1,299	1,857	1,558	1,163	0.05%
Ekuanot®, HBC 366	2,608	2,153	2,335	2,021	1,962	0.05%
El Dorado®	1,876	1,685	2,093	1,580	2,034	0.08%
Elani™, YQHI320	*	*	2,403	2,247	2,046	0.04%
Eureka!™	3,022	2,205	3,028	3,119	2,800	0.03%
Galena	*	*	*	*	*	
HBC 682	2,463	2,132	2,032	2,043	2,425	0.06%
Helios™, HSI5619	*	*	1,733	2,010	*	
Idaho 7®	3,197	2,755	3,062	2,598	2,576	0.04%
Jarrylo™, ADHA-881	*	*	*	*	*	
Krush™, HBC 586	*	*	*	*	2,265	
Loral®, HBC 291	2,088	1,843	1,989	1,807	*	
Mosaic®, HBC 369	2,129	1,963	2,207	2,058	2,260	0.05%
Mt. Hood	*	573	*	*	672	
Mt. Rainier	1,635	1,563	2,031	*	*	
Palisade®, YCR-4	1,866	1,842	2,268	2,208	*	
Pekko®, ADHA-871	2,072	1,882	2,319	*	1,252	
Sabro®, HBC 438	2,207	2,052	3,034	2,397	2,744	0.05%
Simcoe®, YCR 14	1,646	1,380	1,539	1,527	1,503	0.06%
Summit™	1,351	*	*	*	*	
Super Galena™	2,849	2,838	2,970	2,921	2,807	0.03%
Tahoma	1,055	1,310	1,589	1,329	*	
Talus®, HBC 692	*	1,703	1,967	1,864	789	0.02%
Warrior®, YCR 5	2,240	1,610	2,070	1,723	*	
Willamette	1,200	991	971	1,320	1,481	0.08%
Zappa™	*	839	*	*	*	
Experimental	1,713	1,717	1,769	1,924	1,831	0.05%
Other Varieties	1,934	1,577	2,177	1,922	2,212	0.06%
Total Washington	1,932	1,679	1,971	1,922	1,990	0.05%
Total Pacific Northwest	1,900	1,694	1,915	1,944	1,996	0.05%

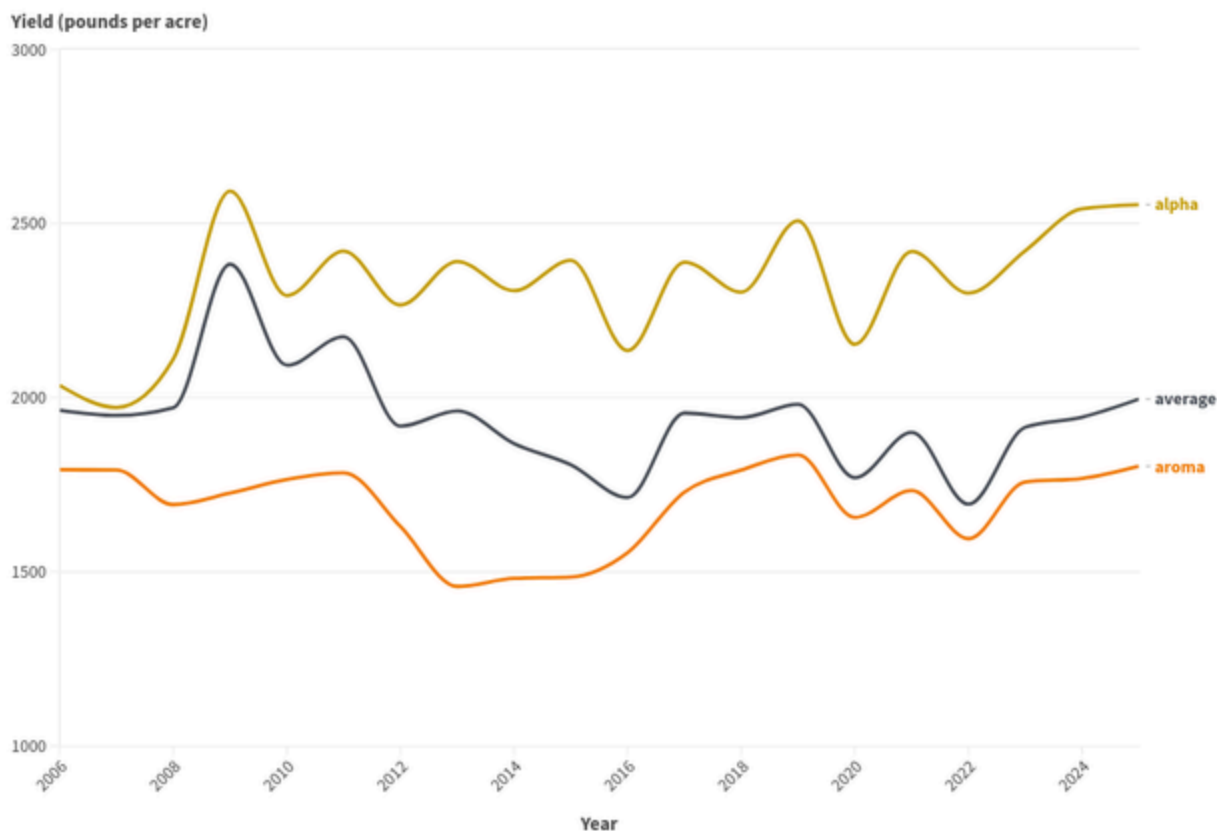
SOURCE: USDA-NASS. Prepared by HGA. State and variety yields for production outside of the Pacific Northwest are not reported. "Other Varieties" includes data to avoid disclosure of individual operations.

U.S. AVERAGE HOP YIELD (TEN YEARS)

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL
2016	1,748	1,596	1,646	1,713
2017	2,046	1,518	1,974	1,956
2018	1,984	1,675	1,995	1,943
2019	2,006	1,783	2,034	1,981
2020	1,754	1,755	1,855	1,770
2021	1,932	1,705	1,900	1,900
2022	1,679	1,729	1,733	1,694
2023	1,971	1,558	1,949	1,915
2024	1,922	1,732	2,273	1,944
2025	1,990	1,759	2,281	1,996

Source: USDA-NASS, prepared by HGA.

U.S. HOP YIELD – AROMA/DUAL PURPOSE VS. ALPHA



HOP PRODUCTION BY STATE AND VARIETY (FIVE YEARS)

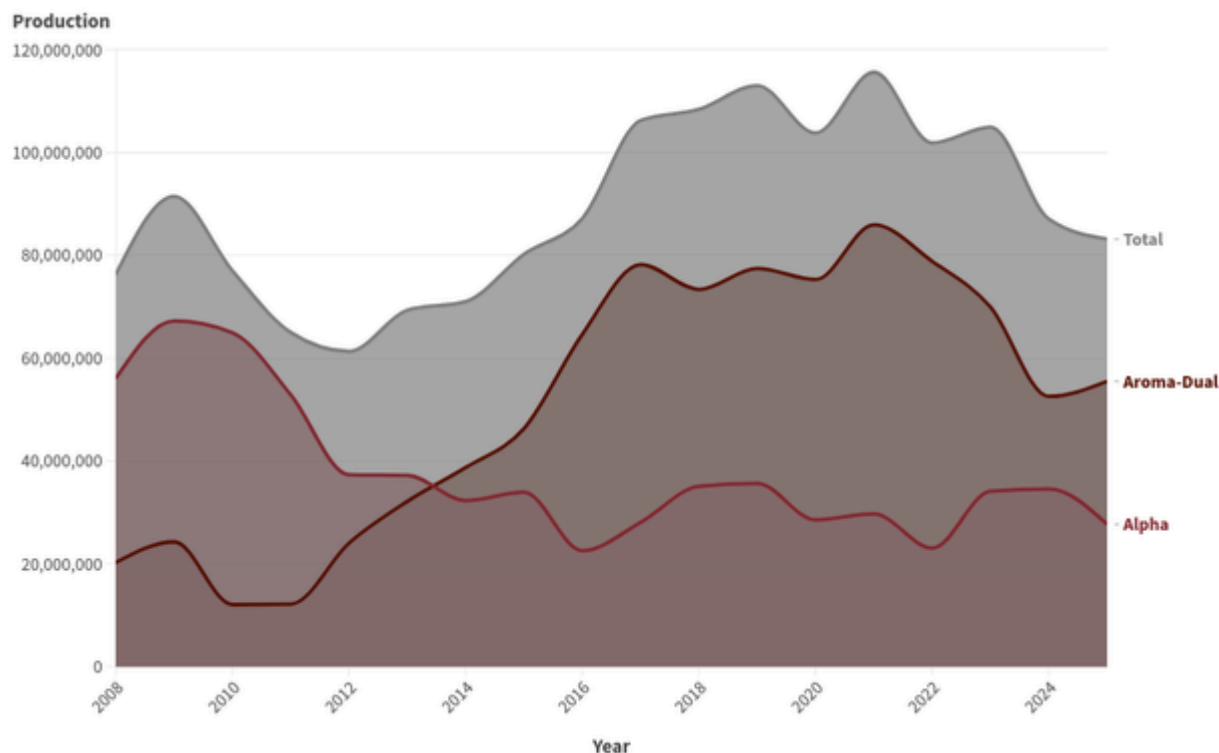
STATE & VARIETY	HOP PRODUCTION (POUNDS)					2024-2025
	2021	2022	2023	2024	2025	% +/-
IDAHO						
Amarillo®, VGXP01	688,900	552,600	853,300	972,000	962,200	-1.01%
Apollo™	*	*	573,500	568,900	*	
Cascade	746,800	1,262,400	1,367,900	692,100	*	
Cashmere	226,700	227,100	120,200	*	*	
Chinook	1,096,200	795,100	837,200	365,400	*	
Citra®, HBC 394	2,462,900	2,677,000	1,603,100	961,600	1,189,000	23.65%
Columbus/Tomahawk®/Zeus	3,314,800	1,574,000	2,793,600	2,705,500	2,636,600	-2.55%
Comet	242,800	268,300	202,700	*	*	
El Dorado®	1,104,100	536,900	546,000	*	*	
Elani™, YQH1320	*	*	9,300	21,400	21,300	-0.47%
Eureka!™	847,300	921,800	1,211,700	969,400	*	
Hallertauer Mittelfrüher	202,200	262,200	172,500	270,900	64,900	-76.04%
Helios™, HS15619	*	*	873,200	1,580,000	*	
Idaho 7®	1,679,500	988,600	745,900	651,200	750,100	15.19%
Mosaic®, HBC 369	2,954,600	3,028,300	2,735,000	1,308,800	1,408,400	7.61%
Mt. Rainier	82,700	115,900	103,800	*	*	
Northern Brewer	73,400	*	*	*	*	
Saaz	204,600	362,900	199,100	302,400	102,600	-66.07%
Simcoe®, YCR 14	434,900	532,700	337,200	135,000	138,200	2.37%
Triumph	76,500	47,900	*	*	*	
Willamette	510,000	639,400	661,000	237,200	231,000	-2.61%
Experimental	*	*	*	52,400	*	
Other Varieties	1,465,900	1,779,200	906,800	1,384,600	4,132,900	198.49%
Total Idaho	18,414,800	16,572,300	16,853,000	13,178,800	11,637,200	-11.70%
OREGON						
Amarillo® VGXP01	421,900	392,700	375,600	392,000	439,600	12.14%
Cascade	1,062,300	1,038,300	1,027,200	795,800	790,400	-0.68%
Centennial	503,800	598,500	408,000	615,700	583,800	-5.18%
Chinook	141,700	138,900	110,400	93,600	178,300	90.49%
Citra®, HBC 394	2,081,400	2,641,300	1,971,100	2,139,500	2,559,000	19.61%
Crystal	288,700	332,100	341,300	326,500	261,300	-19.97%
Golding	72,300	*	*	*	*	
Liberty	81,300	*	20,900	30,800	*	
Mosaic®, HBC 369	1,753,000	1,855,200	1,615,200	1,438,600	1,610,800	11.97%
Mt. Hood	199,800	214,100	258,100	219,800	227,200	3.37%
Mt. Rainier	175,000	191,500	163,200	*		
Nugget	1,236,700	919,500	838,500	571,500	314,000	-45.06%
Sabro®, HBC 438	393,500	237,500	*	*	*	
Simcoe®, YCR 14	819,900	867,400	570,900	597,600	566,300	-5.24%
Sterling	76,600	54,600	55,800	65,300	63,900	-2.14%
Strata™ OR 91331	1,573,500	2,286,000	1,356,700	1,125,600	693,700	-38.37%
Super Galena™	*	*	*	*	*	
Tahoma	*	*	195,900	*	*	
Talus®, HBC 692	*	68,200	*	*	*	
Willamette	651,600	701,300	669,000	389,700	370,200	-5.00%
Experimental	*	*	*	*	53,800	
Other Varieties	1,074,900	934,800	651,900	957,300	705,600	-26.29%
Total Oregon	12,607,900	13,471,900	10,629,700	9,759,300	9,417,900	-3.50%

Continued on next page

STATE & VARIETY	HOP PRODUCTION (POUNDS)					2024-2025
	2021	2022	2023	2024	2025	% +/-
WASHINGTON						
Ahtanum®, YCR 1	367,000	341,400	*	*	*	
Amarillo®, VGXP01	2,213,100	1,967,500	2,421,100	1,807,800	1,997,600	10.50%
Apollo™	*	2,003,800	2,397,200	2,333,300	1,473,100	-36.87%
Azacca®, ADHA-483	1,393,600	1,357,900	794,000	741,300	*	
Bravo™	656,600	438,700	596,600	387,700	345,300	-10.94%
Calypso™	*	*	*	*	*	
Cascade	5,045,100	5,323,100	6,176,300	4,176,400	3,486,100	-16.53%
Cashmere	962,600	1,090,600	502,800	237,300	322,700	35.99%
Centennial	3,135,100	2,992,400	2,504,700	3,284,100	3,274,200	-0.30%
Chinook	2,173,100	1,926,400	2,203,400	1,732,300	1,786,800	3.15%
Citra®, HBC 394	13,850,300	11,719,900	10,007,700	7,717,100	8,741,600	13.28%
Cluster	786,200	430,400	335,800	500,900	458,700	-8.42%
Columbus/Tomahawk®/Zeus	12,013,100	9,019,500	13,052,200	11,549,000	10,789,500	-6.58%
Comet	630,000	424,800	325,000	247,700	243,100	-1.86%
Ekuanot®, HBC 366	993,600	790,200	871,000	875,100	620,000	-29.15%
El Dorado®	2,088,000	1,450,800	1,299,800	892,700	882,800	-1.11%
Elani™, YQH1320	*	*	146,600	130,300	159,600	22.49%
Eureka!™	1,408,300	1,256,900	1,880,400	1,494,000	1,122,800	-24.85%
Galena	*	*	*	*	*	
HBC 682	5,206,800	3,643,600	4,523,200	4,962,400	4,993,100	0.62%
Helios™, HSI5619	*	*	1,743,400	2,771,800	*	
Idaho 7®	1,240,400	435,300	453,200	389,700	386,400	-0.85%
Jarrylo™, ADHA-881	*	*	*	*	*	
Krush™, HBC 586					749,700	
Loral®, HBC 291	411,300	366,800	320,200	191,500	*	
Mosaic®, HBC 369	8,926,900	8,166,100	7,303,000	5,060,600	5,076,000	0.30%
Mt. Hood	*	24,100	*	*	34,300	
Mt. Rainier	341,700	331,400	430,600	*	*	
Palisade®, YCR-4	621,400	694,400	589,700	695,500	*	
Pekko®, ADHA-871	2,217,000	2,040,100	2,423,400	*	1,044,200	
Sabro®, HBC 438	2,471,800	1,124,500	615,900	489,000	496,700	1.57%
Simcoe®, YCR 14	5,221,100	4,821,700	5,360,300	4,387,100	4,451,900	1.48%
Summit™	590,400	*	*	*	*	
Super Galena™	1,367,500	1,004,700	1,051,400	1,037,000	654,000	-36.93%
Tahoma	409,300	501,700	611,800	160,800	*	
Talus®, HBC 692	*	642,000	289,100	177,100	388,200	119.20%
Warrior®, YCR 5	286,700	236,700	306,400	253,300	*	
Willamette	158,400	122,900	193,200	228,400	294,700	29.03%
Zappa™	*	57,900	*	*	*	
Experimental	985,000	1,205,300	1,064,900	790,800	589,600	-25.44%
Other Varieties	6,436,800	3,858,000	3,765,500	4,432,100	7,225,600	63.03%
Total Washington	84,608,200	71,811,500	76,559,800	64,134,100	62,088,300	-3.19%
Total Pacific Northwest	115,630,900	101,855,700	104,042,500	87,072,200	83,143,400	-4.51%

SOURCE: USDA-NASS. Prepared by HGA. State and variety production outside of the Pacific Northwest are not reported.
 "Other Varieties" includes data to avoid disclosure of individual operations

U.S. HOP PRODUCTION – ALPHA VS. AROMA POUNDS OF PRODUCTION

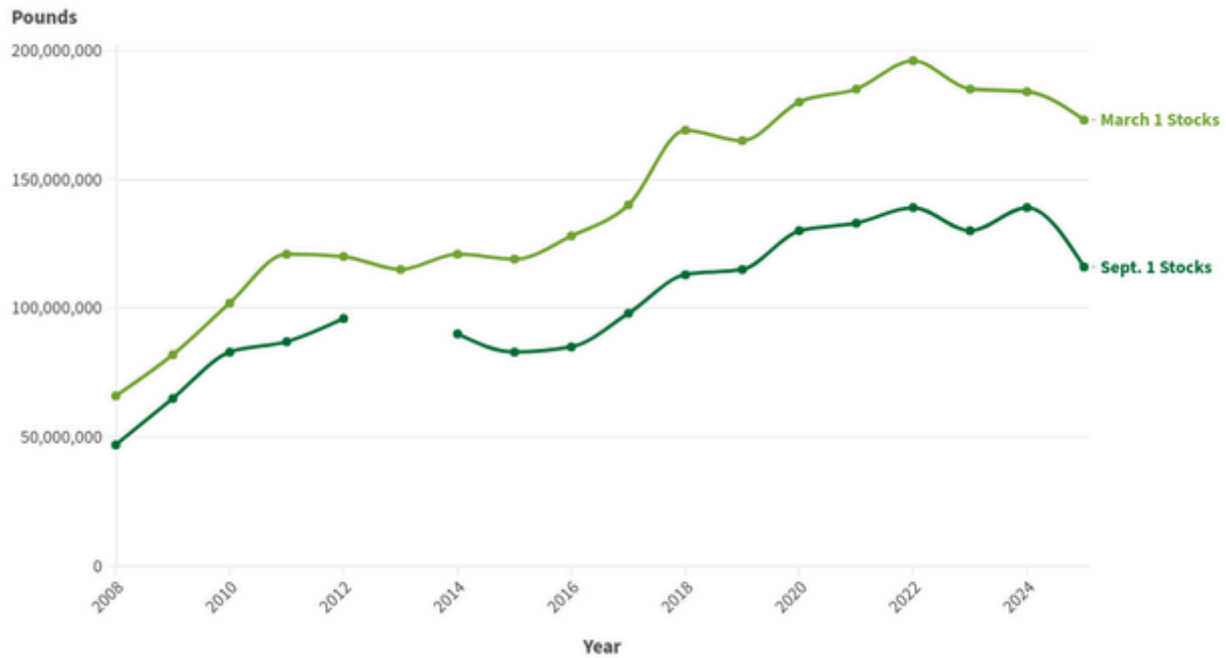


U.S. HOPS: ESTIMATED SEASON AVERAGE PRICE & TOTAL CROP VALUE

Marketing	SEASON AVERAGE PRICE				U.S.	Total Crop
	Washington	Oregon	Idaho	U.S.	Production	Value
Year	----- (\$ / pound) -----				(Lbs. x 1,000)	(x 1,000)
2014	\$3.73	\$4.07	\$2.72	\$3.67	70,995	\$260,627
2015	\$4.71	\$3.24	\$3.53	\$4.38	78,846	\$345,388
2016	\$5.84	\$5.25	\$5.50	\$5.72	87,140	\$498,420
2017	\$5.80	\$5.00	\$5.00	\$5.60	105,622	\$591,375
2018	\$5.50	\$5.40	\$5.30	\$5.46	106,907	\$583,444
2019	\$5.80	\$5.50	\$5.25	\$5.68	112,041	\$636,580
2020	\$6.00	\$6.00	\$5.80	\$5.97	103,810	\$619,424
2021	\$5.70	\$5.90	\$5.70	\$5.72	115,631	\$661,618
2022	\$6.05	\$6.35	\$6.10	\$6.10	101,856	\$621,098
2023	\$5.30	\$6.15	\$5.40	\$5.40	104,043	\$562,146
2024	\$5.00	\$5.80	\$5.20	\$5.12	87,072	\$445,805
2025	\$5.30	\$5.90	\$5.40	\$5.38	83,143	\$447,475

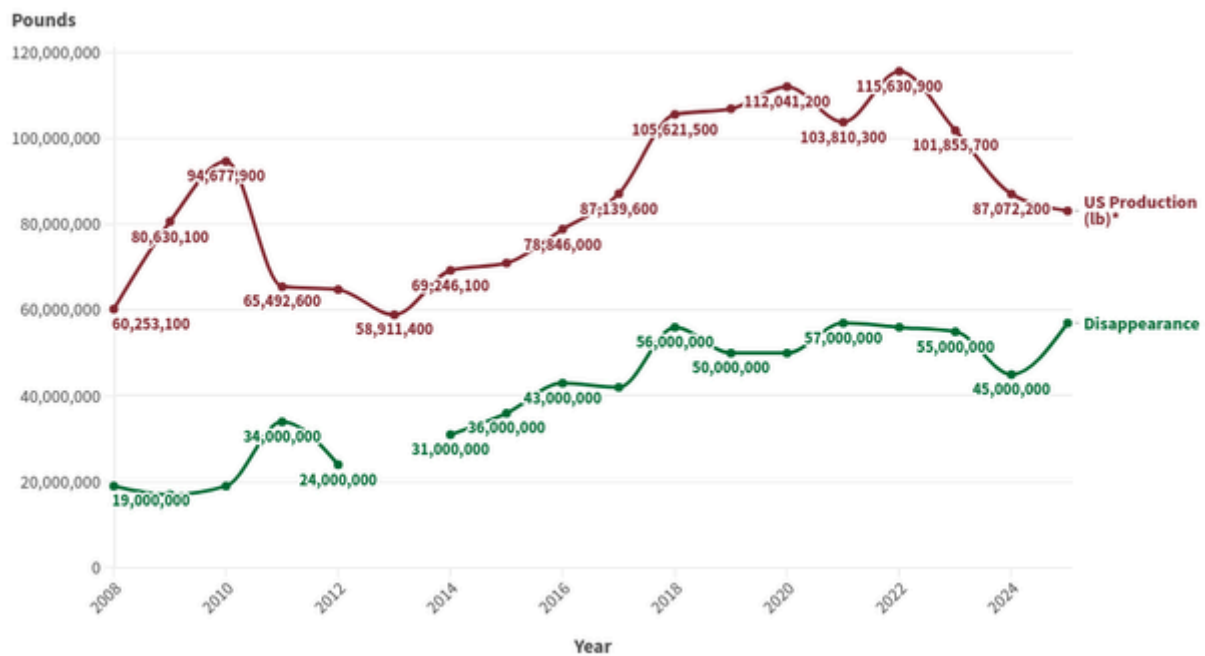
Source: USDA-NASS, prepared by HGA.

U.S. HOP STOCKS



SOURCE: USDA-NASS. Due to Federal funding cuts the September 2012 Hop Stocks survey was not conducted.

PRODUCTION (POUNDS) VS. MARCH TO SEPTEMBER STOCKS DISAPPEARANCE



SOURCE: USDA-NASS. Prepared by HGA. Due to Federal funding cuts the September 2012 Hop Stocks survey was not conducted.

2025 HOP INSPECTION REPORT

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
2021	436,042	62,643	90,994	589,679
2022	361,305	68,284	78,803	508,392
2023	372,093	52,805	83,073	507,971
2024	316,998	47,044	58,527	422,569
2025	301,461	45,992	50,865	398,318

TABLE 1. Total Number of Bales Inspected.

State	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL	AVERAGE
WA	262,669	35,630	2,645	454	63	0	0	0	301,461	0.14%
OR									45,992	0.14%
ID	49,141	1,425	260	0	0	0	0	0	50,826	0.04%
Total	311,810	37,055	2,905	454	63	0	0	0	398,279	0.13%
% of Total	89%	11%	1%	0%	0%	0%	0%	0%	100%	

TABLE 2. Number of Bales in Each Leaf & Stem Category (Only average percentages were received for Oregon) – 2025

State	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL	AVERAGE
WA	258,231	26,845	8,622	3,930	1,875	1,304	581	73	301,461	0.25%
OR									45,992	0.05%
ID	50,826	0	0	0	0	0	0	0	50,826	0.00%
Total	309,057	26,845	8,622	3,930	1,875	1,304	581	73	398,279	0.21%
% of Total	78%	7%	2%	1%	0%	0%	0%	0%	88%	

TABLE 3. Number of Bales in Each Seed Category (Only average percentages were received for Oregon) – 2025

SOURCE: State Hop Inspection Labs. Prepared by HGA.

U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE (10 YEARS)

Year	WASHINGTON Leaf & Stem	OREGON Leaf & Stem	IDAHO Leaf & Stem	U.S. AVERAGE %	
				Leaf & Stem	Seed Content
2017	0.26%	0.50%	0.46%	0.32%	0.87%
2018	0.37%	0.16%	0.78%	0.41%	0.48%
2019	0.29%	0.39%	0.38%	0.37%	1.19%
2020	0.27%	0.04%	0.58%	0.30%	0.67%
2021	0.38%	0.09%	0.65%	0.39%	0.97%
2022	0.17%	0.05%	0.30%	0.17%	0.19%
2023	0.24%	0.08%	0.25%	0.22%	0.33%
2024	0.15%	0.14%	0.14%	0.04%	0.00%
2025	0.14%	0.14%	0.04%	0.13%	0.21%

SOURCE: State Hop Inspection Labs. Prepared by HGA.

2025 US-GROWN HOP VARIETY CODES (INTERNATIONALLY HARMONIZED)

Brand/Variety	Code	Brand/Variety	Code	Brand/Variety	Code
Adeena™ (ADHA-1940)	ADA	Eureka!™	EUE	Perle	PER
Ahhhroma™	AHH	Experimental	EXP	Pink	PNK
Ahtanum® Brand YCR 1	AHT	Fuggle	FUG	Pixi™	PXI
Alpharoma	AAA	Galena	GAL	Saaz	SAZ
Altus™	ATS	Gemini™	GEM	Sabro™ Brand HBC 438	SAB
Amarillo®, VGXP01	VG1	Glacier	GLC	Santiam	SNT
Anchovy	ANC	Golding	GOL	Satus®, YCR 7	SAT
Apollo™	APO	Hallertauer Magnum	HMG	Serebrianka	SEK
Aquila	AQU	Hallertauer Mittelfruher	HAL	Simcoe® Brand YCR 14	SIM
Azacca®, ADHA-483	AZA	HBC 682	682	Sonnet™	SON
Aztec™	AZT	Helios™ (EXP15619)	HLO	Sorachi Ace	SOR
Banner	BAN	Horizon	HOR	Spalter	SPA
Belma®	BEL	Hydra™	HYD	Sterling	STR
Bergamot™	BRG	Idaho Gem™	IDG	Strata™, OR91331	STT
Bitter Gold	BIG	Idaho7®	ID7	Strissel Spalt	FSP
Bravo™	BRO	Jarrylo®, ADHA-881	JAR	Sultana™ (06277, formerly Denali™)	SUL
Brewers Gold	BGO	Krush™, Brand HBC 586	KRU	Summit™	SUM
BRU-1™	BR1	Lemondrop™	LDP	Super Galena™	SGA
Bullion	BUL	Liberty	LIB	Tahoma	TAH
Calypso™	CPO	Loral® Brand HBC 291	LOR	Talisman	TLN
Cascade	CAS	Lórien®, IH101033	LRN	Talus™ HBC 692 c.v.	TAL
Cashmere	CMR	Lotus™	LOT	Tangier™	TGR
Centennial	CEN	Luminosa®	LUM	Teamaker	TMK
Chelan	CHE	Mackinac™	MAC	Tettnanger	TET
Chinook	CHI	McKenzie™	MKZ	Thora	THR
Citra® Brand HBC 394	CIT	Medusa™	MED	Tillicum®	TIL
Cluster	CLU	Meridian	MER	Tomahawk®, F10	TOM
Columbia	CBA	Michigan Copper™	MCO	Topaz™	TOP
Columbus	CBS	Millennium	MLM	TriplePearl	TRP
Columbus/Tomahawk®/Zeus (CTZ)	CTZ	Mosaic® Brand HBC 369	MOS	Triumph	TRI
Comet	COM	Mt. Hood	MTH	Ultra	ULT
Contessa™	CTA	Mt. Rainier	MTR	Valkyrie™	VLK
Crystal	CRY	Newport	NWP	Vanguard	VAN
Delta™	DEL	Northern Brewer	NBR	Vera	VRA
Dolcita™	DOL	Nugget	NUG	Vista	VTA
Ekuanot® Brand HBC 366	EKU	Olympic	OLC	Warrior® Brand YCR 5	WAR
El Dorado®	ELD	Onyx™	ONX	Willamette	WIL
Elani™, YQH1320	ELN	Other	OTH	Yakima Gold	YKG
Emerald Spire™	EMS	Palisade® Brand YCR 4	PAL	Zappa™	ZAP
Erebus™	ERS	Paradigm™	PDM	Zeus	ZEU
Eroica	ERO	Pekko®, ADHA-871	PEK	Zumo™	ZMO

Hop variety codes are internationally harmonized through a collaborative effort managed by the International Hop Growers Convention (IHGC) Scientific Commission.

For a complete list of IHGC varieties, please visit HGA's website at www.usahops.org/growers/industry-standards.html

IHGC AROMA ACREAGE (FIVE YEARS)

COUNTRY	AROMA ACREAGE (IN ACRES)					2024-2025
	2021	2022	2023	2024	2025	% +/-
Argentina	324	324	324	324	324	0.00%
Australia	1,460	1,675	1,965	1604	1,236	-22.96%
Austria	487	494	509	514	524	1.92%
Belgium	306	306	311	309	299	-3.20%
Brazil	*	62	62	62	62	0.00%
Bulgaria	44	44	44	57	57	0.00%
Canada	494	494	494	494	494	0.00%
China	890	699	699	741	741	0.00%
Czech Rep.	11,419	11,434	11,288	11298	11,127	-1.51%
France	1,107	1,114	1,107	1,399	1,297	-7.24%
Germany	26,384	26,073	25,299	23471	20,382	-13.16%
Great Britain	1,310	1,265	1,072	1058	949	-10.28%
Italy	*	*	*	35	35	
Japan	131	131	131	96	96	0.00%
New Zealand	1,478	2,471	2,471	2471	2,471	0.00%
Poland	1,515	2,071	2,100	1,762	1,829	3.79%
Romania	180	180	180	180	180	0.00%
Russia	415	247	259	321	655	103.85%
Serbia	20	20	27	30	30	0.00%
Slovakia	94	94	94	94	94	0.00%
Slovenia	3,477	3,595	3,726	3840	3,692	-3.86%
South Africa	230	210	205	215	215	0.00%
Spain	15	20	20	22	22	0.00%
Ukraine	764	247	247	247	247	0.00%
USA	50,148	49,779	39,976	30,711	31,270	1.82%
IHGC Total	102,691	103,051	92,613	81,354	78,327	-3.72%

SOURCE: IHGC Economic Commission November report. US hop acreage is updated to reflect the USDA-NASS 2025 National Hop Report. Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC ALPHA ACREAGE (FIVE YEARS)

COUNTRY	ALPHA ACREAGE (IN ACRES)					2024-2025
	2021	2022	2023	2024	2025	% +/-
Argentina	116	116	116	116	116	0.00%
Australia	269	269	269	269	198	-26.61%
Austria	143	141	141	143	138	-3.45%
Belgium	143	143	146	128	114	-11.54%
Brazil	*	62	62	62	62	0.00%
Bulgaria	37	37	37	47	47	0.00%
Canada	371	371	371	371	371	0.00%
China	4,942	5,291	5,291	5,931	5,931	0.00%
Czech Rep.	151	138	198	190	205	7.79%
France	124	131	190	171	227	33.33%
Germany	22,915	23,616	24,056	24,775	24,985	0.85%
Great Britain	346	339	299	267	232	-12.96%
Italy	*	*	*	5	5	
Japan	131	131	131	96	96	0.00%
New Zealand	358	988	988	988	988	0.00%
Poland	2,829	2,041	2,170	2,007	2,053	2.34%
Romania	472	479	489	499	512	2.48%
Russia	183	64	74	111	222	100.00%
Serbia	0	0	0	0	0	0.00%
Slovakia	0	0	0	0	0	0.00%
Slovenia	59	62	47	44	42	-5.56%
South Africa	783	801	803	783	783	0.00%
Spain	1,386	1,386	1,374	1,349	1,149	-14.84%
Ukraine	148	124	124	124	124	0.00%
USA	12,111	10,334	14,342	14,082	10,384	-26.26%
IHGC Total	48,019	47,363	51,915	52,559	48,985	-6.80%

SOURCE: IHGC Economic Commission November report. US hop acreage is updated to reflect the USDA-NASS 2025 National Hop Report. Numbers may not total exactly due to rounding and standard/metric conversions.



IHGC TOTAL ACREAGE (5 YEARS)

COUNTRY	TOTAL ACREAGE (IN ACRES)					2024-2025
	2021	2022	2023	2024	2025	% +/-
Argentina	440	440	440	440	440	0.00%
Australia	1,730	1,945	2,234	1,873	1,433	-23.48%
Austria	630	635	650	657	667	1.50%
Belgium	450	450	457	437	413	-5.65%
Brazil	*	124	124	131	131	0.00%
Bulgaria	82	82	82	104	104	0.00%
Canada	865	865	865	865	865	0.00%
China	5,832	5,990	5,990	6,672	6,672	0.00%
Czech Rep.	11,570	11,572	11,486	11,972	11,891	-0.68%
France	1,231	1,245	1,297	1,792	1,853	3.45%
Germany	49,298	49,689	49,355	50,136	46,857	-6.54%
Great Britain	1,656	1,604	1,371	1,325	1,181	-10.82%
Italy	*	*	*	49	49	
Japan	262	262	262	193	193	0.00%
New Zealand	1,836	3,460	3,460	3,460	3,460	0.00%
Poland	4,344	4,112	4,270	3,882	3,907	0.64%
Romania	652	660	670	692	692	0.00%
Russia	598	311	334	754	951	26.23%
Serbia	20	20	27	30	30	0.00%
Slovakia	94	94	94	94	94	0.00%
Slovenia	3,536	3,657	3,773	4,062	3,961	-2.49%
South Africa	1,013	1,011	1,008	998	998	0.00%
Spain	1,401	1,406	1,394	1,416	1,248	-11.87%
Ukraine	912	371	371	371	371	0.00%
USA	62,259	60,113	54,318	44,793	41,654	-7.01%
IHGC Total	150,710	150,115	144,330	137,197	130,114	-5.16%

Note: Totals may not match the sum of aroma and alpha acreage presented in preceding charts due to inclusion of new acreage not strung for harvest in the IHGC Total Acreage figures.

IHGC HOP ACREAGE & PRODUCTION 2025

COUNTRY	2025 HOP ACREAGE (acres)				2025 HOP PRODUCTION (pounds)			
	AROMA	ALPHA	NEW	TOTAL	AROMA	ALPHA	TOTAL	Alpha MT.
Argentina	324	116	0	440	617,288	220,460	837,748	33
Australia	1,236	198	0	1,433	2,865,980	440,920	3,306,900	245
Austria	524	138	4	667	859,794	194,005	1,053,799	45
Belgium	299	114	0	413	321,872	220,460	542,332	21
Brazil	62	62	3	131	169,754	227,074	396,828	16
Bulgaria	57	47	0	104	74,956	52,910	127,867	6
Canada	494	371	0	865	716,495	440,920	1,157,415	53
China	741	5,931	0	6,672	1,543,220	12,786,680	14,329,900	470
Czech Rep.	11,127	205	196	11,891	15,112,533	308,644	15,421,177	290
France	1,297	227	24	1,853	1,624,790	257,938	1,882,728	47
Germany	20,382	24,985	765	46,857	34,455,693	60,652,955	95,108,649	5,238
Great Britain	949	232	0	1,181	1,133,164	302,030	1,435,195	49
Italy	35	5	2	49	46,297	8,818	55,115	2
Japan	96	96	0	193	132,276	220,460	352,736	15
New Zealand	2,471	988	0	3,460	3,086,440	1,388,898	4,475,338	204
Poland	1,829	2,053	45	3,907	2,314,830	3,791,912	6,106,742	269
Romania	180	512	5	692	88,184	352,736	440,920	14
Russia	655	222	130	951	705,472	253,529	959,001	39
Serbia	30	0	0	30	52,910	0	52,910	2
Slovakia	94	0	0	94	83,775	0	83,775	3
Slovenia	3,692	42	72	3,961	5,070,580	99,207	5,169,787	135
South Africa	215	783	11	998	302,030	1,201,507	1,503,537	87
Spain	22	1,149	18	1,248	26,455	1,873,910	1,900,365	103
Ukraine	247	124	0	371	220,460	127,867	348,327	8
USA	31,270	10,384	0	41,654	55,484,405	27,658,995	83,143,400	4,460
IHGC Total	78,327	48,985	1,275	130,114	127,109,654	113,082,836	240,192,490	11,854

SOURCE: IHGC Economic Commission November report. US hop acreage is updated to reflect the USDA-NASS 2025 National Hop Report. 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.

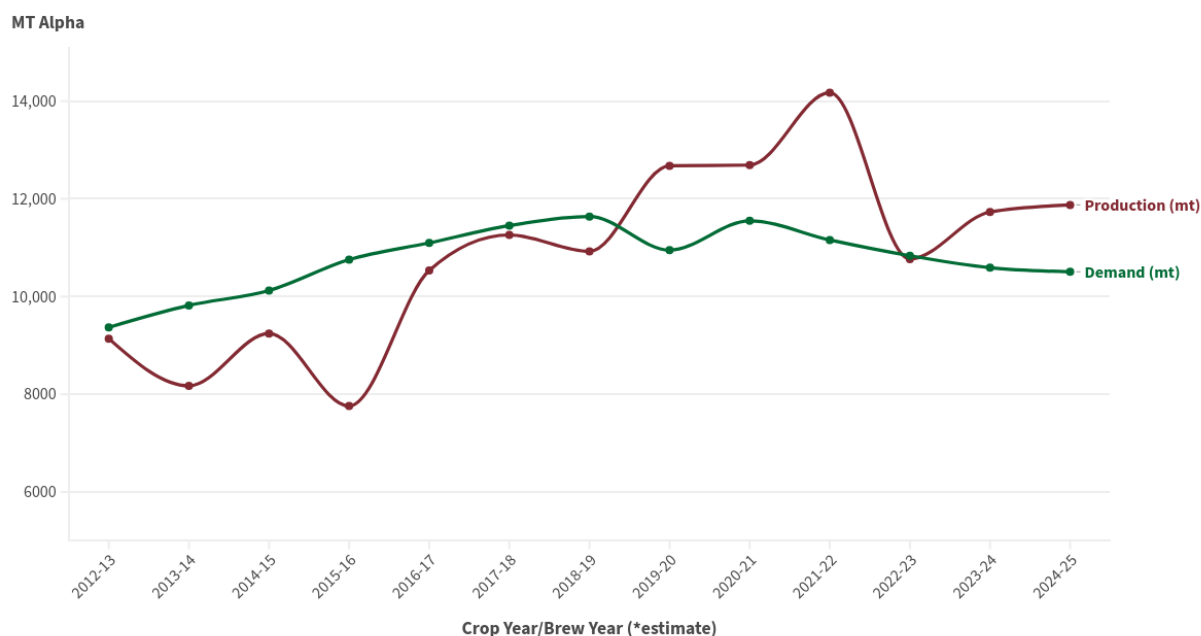
U.S. & GERMAN ALPHA ACID PRODUCTION (10 YEARS)

YEAR	UNITED STATES				GERMANY			
	Pounds of Hops (x 1,000)	MT Hops EBC 7.4 MT=2204.6 lb	MT Alpha	Avg. Alpha %*	Pounds of Hops (x 1,000)	MT Hops	MT Alpha EBC 7.4	Avg. Alpha %*
2016	88,640	40,207	4,082	10.2%	94,304	42,776	4,501	10.5%
2017	107,497	48,760	5,300	11.0%	91,614	41,556	4,047	9.7%
2018	108,407	49,173	5,277	10.7%	92,139	41,794	3,828	9.2%
2019	113,041	51,275	5,755	11.2%	106,861	48,472	5,260	10.9%
2020	103,810	47,088	5,500	11.7%	103,347	46,878	5,438	11.6%
2021	115,631	52,450	5,874	11.2%	104,851	47,862	6,240	13.0%
2022	101,856	46,202	5,452	11.8%	75,397	34,406	3,725	10.8%
2023	104,043	47,194	5,758	12.2%	90,904	41,234	4,170	10.1%
2024	87,072	39,496	4,937	12.5%	102,507	46,497	5,391	11.6%
2025*	83,143	37,713	4,714	12.5%	95,109	43,141	5,238	12.1%

*2025 figures are estimated at time of publication.

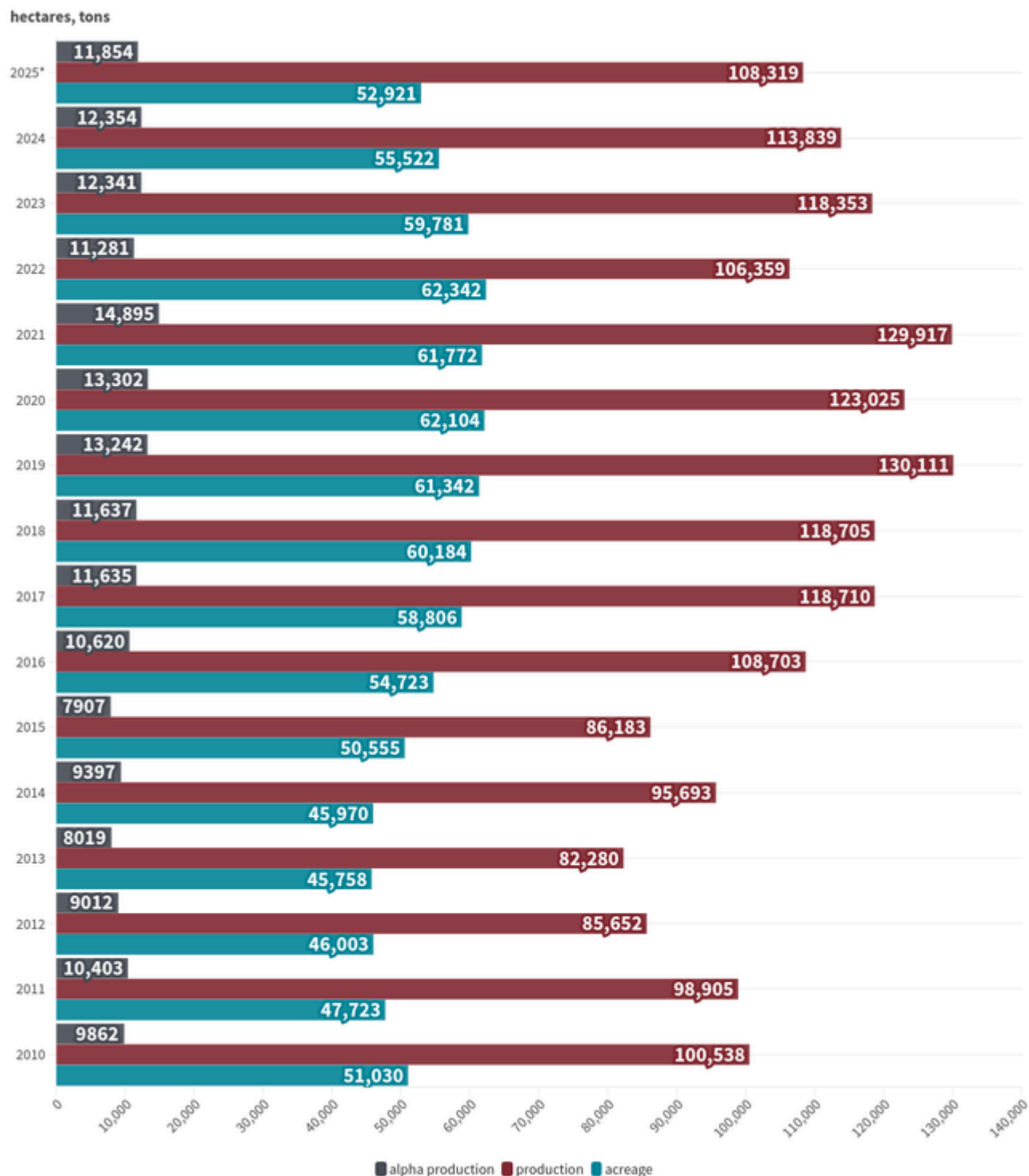
US figures include an estimate for non-PNW states, added to the Pacific Northwest production estimated by US hop merchant sources, based on EBC 7.4 method of analysis. Conversion factor of 90% is used to convert Spectro to EBC 7.4. German estimated alpha figure was also provided by hop merchant contacts.

WORLD ALPHA PRODUCTION & DEMAND



SOURCE: BarthHaas Report. 2024-2025. Prepared by HGA

COMPARISON OF IHGC CROPS 2010-2025



*estimation

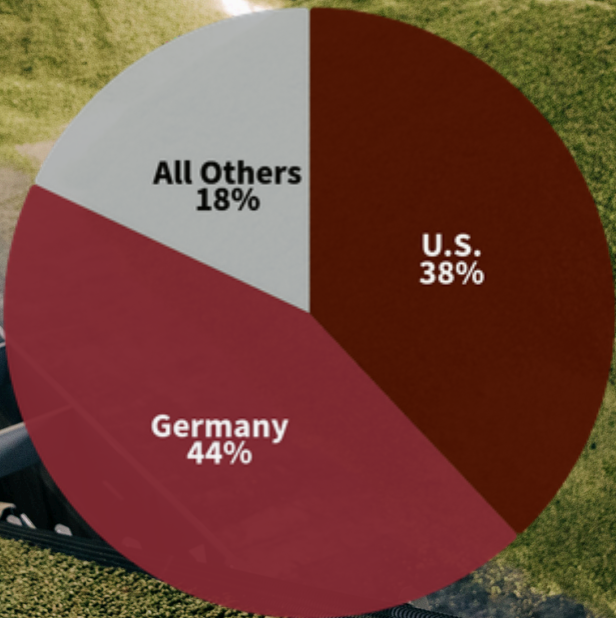
SOURCE: IHGC November 2025 Report. Prepared by HGA.

COMPOSITION OF WORLD HOP ACREAGE - 1992 VERSUS 2025



SOURCE: IHGC November 2025 Report and USDA-NASS 2025 National Hop Report. Prepared by HGA.

WORLD'S LARGEST ALPHA PRODUCERS – 2025



SOURCE: IHGC November 2025 Report. Prepared by HGA.

WORLD HOP ACREAGE & PERCENT SHARE (ACRES)

COUNTRY	2021	2022	2023	2024	2025
Germany	49,298 33%	49,689 33%	49,355 34%	50,136 36%	46,857 36%
USA	62,259 41%	61,177 40%	55,710 38%	44,793 33%	41,654 32%
Czech Rep.	11,570 8%	11,572 8%	11,486 8%	11,972 9%	11,891 9%
China	5,832 4%	5,990 4%	5,990 4%	6,672 5%	6,672 5%
Poland	4,344 3%	4,112 3%	4,270 3%	4,082 3%	3,907 3%
Europe (rest)	10,663 7%	10,223 7%	10,186 7%	11,080 8%	10,663 8%
World (rest)	6,744 4%	8,417 6%	8,725 6%	8,713 6%	8,470 7%
World Totals	150,710	151,179	145,722	137,449	130,114

Europe (rest): Austria, Belgium, Bulgaria, France, Great Britain, Italy, Romania, Serbia, Slovakia, Slovenia, Spain, Ukraine.

World (rest): Argentina, Australia, Brazil, Canada, Japan, New Zealand, Russia, South Africa.

SOURCE: IHGC Economic Commission November 2021-2025 reports. US hop acreage is updated to reflect the USDA-NASS 2025 National Hop Report.

WORLD HOP PRODUCTION & PERCENT SHARE (POUNDS X 1,000)

COUNTRY	2021	2022	2023	2024	2025
Germany	105,517 37%	75,851 32%	90,904 35%	102,507 41%	95,109 40%
USA	116,531 41%	102,756 44%	104,943 40%	87,072 35%	83,143 35%
Czech Rep.	18,311 6%	9,815 4%	15,873 6%	14,440 6%	15,421 6%
China	13,889 5%	13,258 6%	14,330 5%	14,330 6%	14,330 6%
Poland	6,852 2%	7,549 3%	7,844 3%	6,583 3%	6,107 3%
Europe (rest)	14,264 5%	12,626 5%	14,004 5%	13,197 5%	13,093 5%
World (rest)	11,054 4%	13,195 6%	13,737 5%	12,886 5%	12,989 5%
World Totals	286,417	235,050	261,635	251,015	240,192

Europe (rest): Austria, Belgium, Bulgaria, France, Great Britain, Italy, Romania, Serbia, Slovakia, Slovenia, Spain, Ukraine.

World (rest): Argentina, Australia, Brazil, Canada, Japan, New Zealand, Russia, South Africa.

SOURCE: IHGC Economic Commission November 2021-2025 reports. US hop acreage is updated to reflect the USDA-NASS 2025 National Hop Report.

EXPORTS OF U.S. HOPS(INCLUDING EXTRACT), TOP 40 COUNTRIES (2021-2025)

Rank	Destination Partner	September-August Quantities (MT)				
		2021	2022	2023	2024	2025
1	Belgium-Luxembourg(*)	3,151.4	3,864.5	2,671.1	2,907.5	3,224.6
2	Germany	2,127.6	2,327.7	2,179.0	1,886.5	2,530.1
3	Canada	2,073.8	2,054.8	2,033.5	1,877.9	1,757.2
4	China	938.5	1,374.2	1,190.8	1,125.3	1,708.6
5	Brazil	2,280.1	2,258.8	1,992.7	1,724.1	1,555.9
6	United Kingdom	2,090.8	2,306.4	1,420.4	1,819.1	1,475.3
7	Mexico	725.6	885.9	915.6	632.9	954.8
8	Australia(*)	1,017.1	1,230.4	954.9	734.5	845.4
9	Japan	486.5	479.7	487.0	542.5	539.4
10	Argentina	796.8	886.0	400.4	595.2	339.0
11	India	44.3	125.8	140.1	146.6	274.9
12	Vietnam	268.5	198.2	279.0	234.8	270.2
13	Colombia	220.5	182.7	248.9	257.7	263.5
14	New Zealand(*)	242.2	327.4	287.1	141.4	194.2
15	Korea, South	277.6	288.1	297.4	224.3	159.2
16	Chile	297.2	166.0	137.0	149.4	143.1
17	Peru	154.5	100.4	28.7	78.6	133.9
18	Hong Kong	286.1	267.0	133.7	129.3	117.4
19	Netherlands	103.8	321.6	160.9	248.4	105.5
20	South Africa	75.1	43.8	100.0	65.6	87.5
21	Dominican Republic	117.1	83.9	41.7	110.9	82.9
22	Laos	1.6	2.1	17.5	11.9	73.2
23	Venezuela	34.8	68.0	22.3	80.7	66.3
24	Thailand	18.2	260.7	57.9	28.8	65.0
25	Guatemala	47.4	80.2	28.6	85.2	52.7
26	Nigeria	0.0	1.2	25.3	1.9	49.3
27	Russia	145.9	144.9	39.6	21.1	48.1
28	Philippines	66.4	68.3	91.2	60.9	43.7
29	Ireland	74.0	123.5	45.7	63.8	43.6
30	Ecuador	63.1	44.5	31.2	23.6	38.2
31	Bolivia	14.4	46.0	59.7	16.7	33.3
32	Honduras	25.5	4.9	22.7	39.6	30.6
33	Costa Rica	18.4	12.6	15.5	7.2	28.9
34	Burma	6.9	12.7	27.3	23.3	27.0
35	Cambodia	28.5	27.5	43.3	22.6	24.0
36	El Salvador	38.3	31.4	14.1	24.9	23.1
37	Uruguay	23.1	58.6	37.7	12.7	22.3
38	Indonesia	17.2	41.1	30.5	11.3	20.4
39	Paraguay	20.3	16.6	21.5	1.6	19.7
40	Panama	61.8	38.2	29.1	20.9	19.6
Total Top 40 Countries		18,480.9	20,856.3	16,760.6	16,191.2	17,491.6
All Other Countries		297.7	333.9	287.6	216.4	174.8
Grand Total		18,778.6	21,190.2	17,048.2	16,407.6	17,666.4

USDA Global Agricultural Trade System. Data Source: U.S. Census Bureau Trade Data. (*) denotes a country that is a summarization of its component countries. Quantity includes the total for all forms of hops (dried cones, powder, pellets, extract, and downstream products) with no conversion factor applied to represent dried hop cone weight equivalent.



U.S. IMPORTS OF HOPS (FIVE YEARS)

Rank	Destination Partner	September-August Quantities (MT)				
		2021	2022	2023	2024	2025
1	Germany	3,073.2	2,243.6	2,050.0	1,423.8	1,577.6
2	New Zealand(*)	852.6	1,148.50	1,332.90	745.8	582.2
3	Australia(*)	399.8	1,009.90	817.4	755.7	575.6
4	United Kingdom	134.7	157.4	118	162.5	144.1
5	Czech Republic	163.9	142.9	82.5	129.9	85.8
6	China	11.5	5.7	3.9	6.1	45.1
7	France(*)	4.1	3.6	27.7	1.9	23.5
8	Slovenia	22.5	12	14.2	4.2	21.9
9	India	0	0	1	0	12
10	Canada	25	23.6	42.3	30.2	11.5
11	Jamaica	0	0	0	3.2	9.5
12	Austria	5.7	10.2	2.3	2.8	3.1
13	Poland	2.1	1.7	0.4	0.8	1
14	Mexico	0	0	0	0	0.5
15	Ethiopia(*)	6.7	9.5	0	5.1	0.2
16	Spain	0	0.2	2.2	0	0.1
17	Belgium-Luxembourg(*)	10.5	8.1	30.3	5.7	0
18	South Africa	0	265.6	11.4	0	0
19	Netherlands	0	27.9	10.5	0	0
20	Italy(*)	6.2	0.9	0.6	0	0
21	Hong Kong	0	0	0.4	0	0
22	Slovakia	0	0	0.1	0	0
23	Argentina	0	0.3	0	0	0
Grand Total		4,718.5	5,071.6	4,548.1	3,277.7	3,093.7

USDA Global Agricultural Trade System. Data Source: U.S. Census Bureau Trade Data. Quantity includes the total for all forms of hops (dried cones, powder, pellets, extract, and downstream products) with no conversion factor applied to represent dried hop cone weight.

WORLD BEER PRODUCTION 2023-2025 (MILLION HL)

Country	2023	2024	2025*	2024-25 +/-%
Germany	84.0	82.5	73.0	-11.5%
Russia	83.0	88.0	90.5	2.8%
Spain	41.5	41.2	41.0	-0.5%
United Kingdom	34.2	34.0	36.0	5.9%
Poland	37	34.6	34.0	-1.7%
Other states	221.8	269.3	228.5	-15.2%
Total Europe	501.5	515.0	469.0	-8.9%
USA	197.0	185.0	175.0	-5.4%
Brazil	150.4	148.0	145.0	-2.0%
Mexico	136.4	142.0	142.0	0.0%
Colombia	25.8	26.0	26.2	0.8%
Other states	106.7	105.0	104.8	-0.2%
Total Americas	616.3	606.0	593.0	-2.2%
P.R. China	355.0	352.0	349.0	-0.9%
Japan	44.7	42.4	40.0	-5.7%
Vietnam	36.0	34.0	36.0	5.9%
India	24.4	26.0	28.0	7.7%
Other states	103.0	105.6	104.0	-1.5%
Total Asia	563.1	560.0	557.0	-0.5%
South Africa	33.0	35.0	37.0	5.7%
Other states	122.6	126.0	126.0	0.0%
Total Africa	155.6	161.0	163.0	1.2%
Total Oceania	20.1	21.0	20.4	-2.9%
WORLD TOTALS	1,857	1,863	1,802	-3.2%

Source: S.S. Steiner Guidelines 2025

- Estimate

WORLD BEER PRODUCTION BY BREWERY (TOP 10) 2023-24 (MILLION HL)

Brewery	2023 Production	2023 % Share	2024 Production	2024 % Share
ABInBev	505.90	26.9%	495.49	26.4%
Heineken	242.60	12.9%	240.70	12.8%
China Res. Snow Breweries	111.51	5.9%	108.80	5.8%
Carlsberg	101.00	5.4%	101.20	5.4%
Molson-Coors	83.77	4.4%	79.62	4.2%
Tsingtao Brewery Group	74.10	3.9%	75.38	4.0%
Asahi Group	65.00	3.5%	65.00	3.5%
BGI/Groupe Castel	42.70	2.3%	44.00	2.3%
Yanjing	39.42	2.1%	40.00	2.1%
Efes Group	35.70	1.9%	38.70	2.1%
Top 10 total	1,301.7	69.2%	1,288.9	68.6%

The top 3 brewing groups controlled 45% of the market share in 2024, down from 45.7% in 2023.

The top 40 brewing groups worldwide represented 87.4% market share in 2024.

Source: Barth Report 2024-25