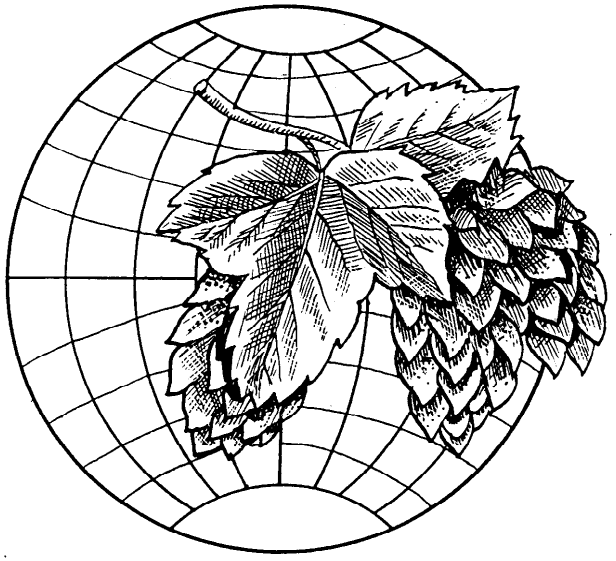
INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

HOBART, AUSTRALIA
FEBRUARY, 2011

International Hop Growers' Convention

IHGC - Economic Commission Summary Reports

Hobart, AUSTRALIA - February 14, 2011

Country	Hop Acreage 2010 (Hectares, Ha)				Hop Production 2010 (in MT = 1.000 kg)			Alpha acid Prod.	Hop Acreage 2011 (Hectares, Ha) estimations				Hop Production 2011 (in MT = 1.000 kg) estimations			Alpha acid Prod.
	Aroma	Alpha	Total	New ´	Aroma	Alpha	Total	MT	Aroma	Alpha	Total	New ´	Aroma	Alpha	Total	MT
Australia	32	416	448	0	51	1.048	1.099	144	46	378	424	0	59	1.037	1.096	139
Austria	185	32	217	16	300	68	368	31	193	36	229	9	314	71	385	31
Belgium°	50	133	183	0	60	240	300	28	50	133	183	0	60	240	300	28
China°	580	5.216	5.796	0	1.600	14.500	16.100	860	580	5.216	5.796	0	1.600	14.500	16.100	860
Czech Republic	4.943	74	5.017	193	7.631	141	7.772	314	4.039	71	4.110	190	5.260	140	5.400	193
France	398	45	443	137	691	99	790	34	511	69	580	45	653	90	743	34
Germany	9.649	8.460	18.109	277	16.333	17.901	34.234	3.600	9.500	8.100	17.600	200	16.000	17.000	33.000	3.500
New Zealand°	230	150	380	0	440	350	790	95	230	150	380	0	440	350	790	95
Poland°°	408	1.360	1.768	0	500	1.400	1.900	150	408	1.360	1.768	0	500	1.400	1.900	150
Romania°	64	172	236	0	62	145	207	17	64	172	236	0	62	145	207	17
Russia°	152	68	220	0	110	50	160	7	152	68	220	0	110	50	160	7
Serbia°	34	33	67	12	58	76	134	11	34	33	67	12	58	76	134	11
Slovakia	229	0	229	0	229	0	229	7	229	0	229	0	244	0	244	11
Slovenia	1.299	56	1.355	36	2.224	80	2.304	170	1.146	59	1.205	36	2.120	80	2.200	155
South Africa°	0	481	481	37	0	807	807	99	0	481	481	0	0	913	913	128
Spain	0	477	477	0	0	1.037	1.037	128	0	477	477	0	0	1.037	1.037	128
Ukraine°	660	276	936	52	510	240	750	42	660	276	936	52	510	240	750	42
UK–England	817	252	1.069	20	1.150	450	1.600	100	817	252	1.069	20	1.150	450	1.600	100
USA	4.164	8.498	12.662	0	5.513	24.194	29.707	3.500	3.800	7.800	11.600	0	4.940	21.840	26.780	3.150
IHGC	23.894	26.199	50.093	780	37.462	62.826	100.288	9.337	22.459	25.131	47.590	564	34.080	59.659	93.739	8.779

° Since no country updates for 2010 or 2011 were available, figures from previous reports were used. °° IHGC external estimation.

' New hop areas with "lower crop" are stated separately.

Table data summarized from national reports and revised after the meeting by the IHGC secretary general:

Dr. Martin Pavlovič (March 10, 2011).

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:
Australia

Hop Area (Ha = Hectares)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	32	46	14	44%
Alpha	416	378	-38	-9%
Total	448	424	-24	-5%

New Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)
Aroma	0	0
Alpha	0	0
Total	0	0

TOTAL Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	32	46	14	44%
Alpha	416	378	-38	-9%
Total	448	424	-24	-5%

Production MT = Metric Tons	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	51	59	8	16%
Alpha	1.048	1.037	-11	-1%
Total	1.099	1.096	-3	0%

Yield MT/Ha	Year N-1 2010	Year N 2011 (Estimate)	Difference %
Aroma	1,6	1,3	-20%
Alpha	2,5	2,7	9%
Total	2,5	2,6	5%

Alpha Prod.	Year N-1	2010	Year N	2011	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(Estimate)	%		%
Aroma	3,4	6,5	3,5	5,9	0,1	-0,6
Alpha	140,5	13,4	135,4	13,1	-5,1	-0,3
Total	143,9	13,1	138,9	12,7	-5,0	-0,4

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						
Cluster	20	23	3	6,5	5,8	-0,7
Alpha						
Pride of Ringwood	95	90	-5	9,4	9,2	-0,2
Super Pride	131	134	3	14,4	13,6	-0,8
Topaz	101	85	-16	15,2	15,1	-0,1

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:

Australia

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Metric tons						
% Crop / Year N	95%	85%	54%	20%	20%	20%

Unsold Hops (MT) : Crop Year (N-1) **2010**	**Aroma**	**Alpha**	**Total**
Total Hop Production			
- Sold Production			
= Unsold Hops			
% unsold Hops			

Hop Prices Euro / Kg	**Year (N-2) 2009**	**Year (N-1) 2010**	**Year (N) 2011**	**% Diff. 2010 vs. 2009**	**Kind of Price**
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country & Date:
Australia, January 2011

Member Organization:

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country: **Austria**

Hop area (ha)	Year N-1 2010	Year N 2011 (estimate)	Difference N - (N-1)	Difference %
Aroma	185	193	8	4,3
Alpha	32	36	4	12,5
Total	217	229	12	5,5

New Hop Area (ha)	Year N-1 2010	Year N 2011 (estimate)
Aroma	12	9
Alpha	4	0
Total	16	9

TOTAL Hop area (ha)	Year N-1 2010	Year N 2011 (estimate)	Difference N - (N-1)	Difference %
Aroma	197	202	5	2,5
Alpha	36	36	0	0,0
Total	233	238	5	2,1

Production MT	Year N-1 2010	Year N 2011 (estimate)	Difference N - (N-1)	Difference %
Aroma	300	314	14	4,7
Alpha	68	71	3	4,4
Total	368	385	17	4,6

Yield MT/ha	Year N-1 2010	Year N 2011 (estimate)	Difference %
Aroma	1,6	1,6	0,0
Alpha	2,1	2,0	0,3
Total			

Alpha prod. (Tones)	Year N-1	2010	Year N	2011	Difference	N-(N-1)
	metric tons	av. contents	metric tons	av. contents	metric tons	av. contents
		%	(estimate)	%		%
Aroma	20,4	6,8	20,1	6,4	-0,3	0,4
Alpha	10,5	15,5	10,6	14,9	0,0	0,6
Total	30,9		30,7			

Main Varieties (hectares)	Year N-1 Total acreage	Year N Total acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Malling	29	25				
Perle	39	41				
Celeia	52	52				
Cicero	18	18				
Aurora	30	30				
Alpha						
Magnum	33	33				

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:

Austria

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016 & later**
Metric Tons	385	370	370	230	220	220
% Crop / Year N	95	95	65	60	60	60

Unsold Hops (MT) : Crop Year (n-1) **2010**	**Aroma**	**Alpha**	**Total**
Total Hop Production	300	68	368
- Sold Production	299	68	367
= unsold Hops	1	0	0
% unsold Hops	0,3	0	0

Hop Prices Euro / Kg	**Year (N-2) 2009**	**Year (N-1) 2010**	**Year (N) 2011**	**% Diff. 2007 vs 2008**	**Kind of price**
Spot price					
Aroma Hops	6,8				
Alpha Hops	3,5				
Average Price	6,3				
Contract prices					
Aroma Hops	6,6	6,3	6,4	0,1	Erzeugerpreis / kg RH
Alpha Hops	11	9,2	6,4	-2,8	Erzeugerpreis / kg RH
Average price	7,3	7,7	6,4	-1,3	
Average Prices					
Aroma Hops	6,6				
Alpha Hops	10,5				
AVERAGE	7,2				

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country & Date: Austria 17.01.2011

Member Organization: Austria

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:
Czech Republic

Hop Area (Ha = Hectares)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	4943	4039		
Alpha	74	71		
Total	5017	4310		

New Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)
Aroma	189	186
Alpha	4	4
Total	193	190

TOTAL Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	5132	4425		
Alpha	78	75		
Total	5210	4500		

Production MT = Metric Tons	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	7.631	5.260		
Alpha	141	140		
Total	7.772	5.400		

Yield MT/Ha	Year N-1 2010	Year N 2011 (Estimate)	Difference %
Aroma	1,48	1,18	
Alpha	1,8	1,6	
Total	1,5	1,2	

Alpha Prod.	Year N-1	2010	Year N	2011	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(Estimate)	%		%
Aroma	300,0		180,0			
Alpha	14,0		13,0			
Total	314,0		193,0			

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						
SAAZ	4557	3864				
Sladek	277	270				
Premiant	277	270				
Alpha						
Agnus	61	61				

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:
Czech Republic

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Metric tons						
% Crop / Year N	92	85	80	60		

Unsold Hops (MT) : Crop Year (N-1) **2010**	**Aroma**	**Alpha**	**Total**
Total Hop Production			
- Sold Production			
= Unsold Hops			
% unsold Hops			

Hop Prices Euro / Kg	**Year (N-2) 2009**	**Year (N-1) 2010**	**Year (N) 2011**	**% Diff. 2010 vs. 2009**	**Kind of Price**
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

In this time, we are not able to predict development of acreage. Current market situation at beer development and hop industry is not predictable. And in the early of February is imposible to say it. We have had the highest yield for 90 yrs in 2010 crop. We have contracted 2011 crop by 92 %**.**
We are anticipating however it is so roughly to say it that our acreage will be decrease but only temporarily.

Country & Date:
1st February 2011

Member Organization:
Hop Growers Union of the CZ

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:
France

Hop Area (Ha = Hectares)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	397,7	510,9	113,2	28,5
Alpha	45,3	68,8	23,5	51,9
Total	443,0	579,7	136,7	30,9

New Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)
Aroma	113,2	45,0
Alpha	23,5	0,0
Total	136,7	45,0

TOTAL Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	510,9	555,9	45,0	8,8
Alpha	68,8	68,8	0,0	0,0
Total	579,7	624,7	45,0	7,8

Production MT = Metric Tons	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	691,2	653,0	-38,2	-5,5
Alpha	98,9	90,0	-8,9	-9,0
Total	790,1	743,0	-47,1	-6,0

Yield MT/Ha	Year N-1 2010	Year N 2011 (Estimate)	Difference %
Aroma	1,7	1,7	0,0
Alpha	2,2	2,2	0,0
Total	1,8	1,8	0,0

Alpha Prod.	Year N-1	2010	Year N	2011	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(Estimate)	%		%
Aroma	25,8	3,7	25,8	3,7	0,0	0,0
Alpha	8,4	10,0	8,4	10,0	0,0	0,0
Total	34,2		34,2		0,0	

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference N-(N-1)	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1) Alpha %
Aroma						
Strisselspalt	219,60	110,00	-109,60			
Tradition	196,49	196,49	0,00			
Challenger	7,70	7,70	0,00			
Fuggle	36,50	45,00	8,50			
Alpha						
Columbus	26,23	26,23	0,00			
Brewers Gold	12,18	12,18	0,00			
Nugget	13,63	13,63	0,00			
Magnum	8,42	8,42	0,00			

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:
France

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Metric tons	470	470				
% Crop / Year N	52%	52%				

Unsold Hops (MT) : Crop Year (N-1) **2010**	Aroma	Alpha	Total
Total Hop Production	691	99	790
- Sold Production	541	99	640
= Unsold Hops	150	0	150
% unsold Hops	23%	0%	20%

Hop Prices Euro / Kg	Year (N-2) 2009	Year (N-1) 2010	Year (N) 2011	% Diff. 2010 vs. 2009	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country & Date:
France
2.2.2011

Member Organization:
A.G.P.H
Association Générale des Producteurs de Houblon de France
Bernard INGWILLER

International Hop Growers' Convention

IHGC-Economic Commission: Feb.2011, Australien

Land : Deutschland

Anbaufläche (ha)	Jahr N-1 2010	Jahr N 2011 Schätzung	Differenz N - (N-1)	Differenz %
Aroma	9649	9500	-149	-1,5
Alpha	8460	8100	-360	-4,3
Gesamt	18109	17600	-509	-2,8

Neue Flächen (ha)	Jahr N-1 2010	Jahr N 2011 Schätzung
Aroma	151	100
Alpha	126	100
Gesamt	277	200

GESAMT Anbaufläche(ha)	Jahr N-1 2009	Jahr N 2011 Schätzung	Differenz N - (N-1)	Differenz %
Aroma	9800	9600	-200	-2,0
Alpha	8586	8200	-386	-4,5
Gesamt	18386	17800	-586	-3,2

Produktion (Tonnen)	Jahr N-1 2010	Jahr N 2011 Schätzung	Differenz N - (N-1)	Differenz %
Aroma	16.333	16.000	-333	-2,0
Alpha	17.901	17.000	-901	-5,0
Gesamt	34.234	33.000	-1.234	-3,6

Ertrag (T/ha)	Jahr N-1 2010	Jahr N 2011 Schätzung	Differenz %
Aroma	1,7	1,7	0,0
Alpha	2,1	2,1	-0,6
Gesamt	1,9	1,9	-0,4

Alpha prod. (Tonnen)	Jahr N-1 metric Tonnen	2010 Durchschnitt %	Jahr N metric tonnen (Schätzung)	2011 Durchschnitt %	Differenz metric Tonnen	N-(N-1) Durchschnitt %
Aroma	1030,0	6,3	1000,0	6,3	-30,0	-0,1
Alpha	2570,0	14,4	2500,0	14,7	-70,0	0,3
Gesamt	3.600	10,5	3.500	10,6	-100,0	0,1

Verschiedene Sorten (ha)	Jahr N-1 Total Anbaufläche	Jahr N Total Anbaufläche	Differenz N-(N-1)	Jahr N-1 Alpha %	Jahr N Alpha %	Differenz N-(N-1)
Aroma Sp. Sel.	800	700	-100			
Perle	3403	3400	-3	7,5	7,3	-0,2
Hall.Tradition	2624	2650	26	6,5	6,2	-0,3
Hersbrucker	758	760	2	3,5	2,9	-0,6
Hallertauer	1069	1050	-19	3,9	4	0,1
Alpha						
Hall.Magnum	4202	4000	-202	13,3	13,8	0,5
North.Brewer	375	300	-75	9,7	9,1	-0,6
Hall.Taurus	1054	1000	-54	16,3	16	-0,3
Herkules	2542	2550	8	16,1	16,1	0

International Hop Growers' Convention
IHGC-Economic Commission: Feb.2011, Australien

Land : Deutschland

Vorverträge	Jahr N	Jahr N+1	Jahr N+2	Jahr N+3	Jahr N+4	Jahr N+5
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016 u später**
Tonnen	28200	25400	22100	16400	10300	4300
% Ernte / Jahr N	85	77	67	50	31	13

Unverkaufte Hopfen (Tonnen) : Ernte Jahr (n-1) **2010**	Aroma	Alpha	Gesamt
Gesamte Hopfenproduktion	16333	17901	34234
- Verkaufte Produktion	16333	17901	34234
= unverkaufte Hopfenmenge	0	0	0
% unverkaufter Hopfen	0	0	0

Hopfenpreis €/kg	Jahr (N-2) 2009	Jahr (N-1) 2010	Jahr (N) 2011	% Diff. 2010vs.2009	Preisstellung
Spot preise					
Aroma Hopfen	1,73				Erzeugerpreise (netto)
Alpha Hopfen	1,87				Erzeugerpreise (netto)
Durchschnitt Preis	1,79				Erzeugerpreise (netto)
Vertragspreise					
Aroma Hopfen	4,39				Erzeugerpreise (netto)
Alpha Hopfen	4,40				Erzeugerpreise (netto)
Durchschnitt Preis	4,39				Erzeugerpreise (netto)
Durchschnitt Preis					
Aroma Hopfen	3,87				Erzeugerpreise (netto)
Alpha Hopfen	3,99				Erzeugerpreise (netto)
DURCHSCHNITT	3,93				Erzeugerpreise (netto)

KOMMENTAR ZUR AKTUELLEN MARKTLAGE

Die Prognose zur Flächenentwicklung entspricht der höchstmöglichen Einschätzung.

Land & Datum :

Deutschland 17.1.2011

Verband deutscher Hopfenpflanzer

gez. Brunner

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:

SLOVAKIA

Hop Area (Ha = Hectares)	**Year N-1 2010**	**Year N 2011** (Estimate)	**Difference N - (N-1)**	**Difference %**
Aroma	229	229	0	0,0
Alpha	0	0	0	0,0
Total	229	229	0	0,0

New Hop Area (Ha)	**Year N-1 2010**	**Year N 2011** (Estimate)
Aroma	0	0
Alpha	0	0
Total	0	0

TOTAL Hop Area (Ha)	**Year N-1 2010**	**Year N 2011** (Estimate)	**Difference N - (N-1)**	**Difference %**
Aroma	229	229	0	0,0
Alpha	0	0	0	0,0
Total	229	229	0	0,0

Production MT = Metric Tons	**Year N-1 2010**	**Year N 2011** (Estimate)	**Difference N - (N-1)**	**Difference %**
Aroma	205	244	39	19,0
Alpha	0	0	0	0,0
Total	205	244	39	19,0

Yield MT/Ha	**Year N-1 2010**	**Year N 2011** (Estimate)	**Difference %**
Aroma	0,9	1,1	12,0
Alpha	0,0	0,0	0,0
Total	0,9	1,1	12,0

Alpha Prod.	**Year N-1**	**2010**	**Year N**	**2011**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	(Estimate)	**%**		**%**
Aroma	7,0	0,0	11,0	57,1	4,0	57,1
Alpha	0,0	0,0	0,0	0,0	0,0	0,0
Total	7,0	0,0	11,0	57,1	4,0	57,1

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						
SAAZ	229	229	0	7	11	4
Alpha						

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:

SLOVAKIA

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Metric tons	244	240				
% Crop / Year N	90	60				

Unsold Hops (MT) : Crop Year (N-1) **2010**	**Aroma**	**Alpha**	**Total**
Total Hop Production	205	0	205
- Sold Production			
= Unsold Hops			
% unsold Hops			

Hop Prices Euro / Kg	**Year (N-2) 2009**	**Year (N-1) 2010**	**Year (N) 2011**	**% Diff. 2010 vs. 2009**	**Kind of Price**
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country & Date:
1.februar 2011

Member Organization:
SLOVAKIA HOP GROWERS
Drabant Václav

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:

Slovenia

Hop Area (Ha = Hectares)	**Year N-1 2010**	**Year N 2011** (Estimate)	**Difference N - (N-1)**	**Difference %**
Aroma	1.299	1146		
Alpha	56	59		
Total	1.355	1205	-150	

New Hop Area (Ha)	**Year N-1 2010**	**Year N 2011** (Estimate)
Aroma	33	36
Alpha	3	
Total	36	36

TOTAL Hop Area (Ha)	**Year N-1 2010**	**Year N 2011** (Estimate)	**Difference N - (N-1)**	**Difference %**
Aroma	1.332	1.182		
Alpha	59	59		
Total	1.391	1.241	-150	

Production MT = Metric Tons	**Year N-1 2010**	**Year N 2011** (Estimate)	**Difference N - (N-1)**	**Difference %**
Aroma	2.315	2.120		
Alpha	85	80		
Total	2.400	2.200	-200	

Yield MT/Ha	**Year N-1 2010**	**Year N 2011** (Estimate)	**Difference %**
Aroma			
Alpha			
Total	1,7	1,8	

Alpha Prod.	**Year N-1**	**2010**	**Year N**	**2011**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	(Estimate)	**%**		**%**
Aroma						
Alpha						
Total	170,0		155,0			

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						
Super Styrian Aurora	845	695				
Styrian Golding	326	326				
Styrian Golding B	132	96				
Other	29	29				
Alpha						
H. Magnum	59	59				

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:

Slovenia

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1) **2010**	**Aroma**	**Alpha**	**Total**
Total Hop Production			2400
- Sold Production			
= Unsold Hops			400
% unsold Hops			16%

Hop Prices Euro / Kg	**Year (N-2) 2009**	**Year (N-1) 2010**	**Year (N) 2011**	**% Diff. 2010 vs. 2009**	**Kind of Price**
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country & Date:
February, 2011

Member Organization:
Slovenian Hop Growers

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country: **SPAIN**

Hop Area (Ha = Hectares)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha	477	477		
Total				

New Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha	477	477		
Total				

Production MT = Metric Tons	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha	1.037	1.037		
Total				

Yield MT/Ha	Year N-1 2010	Year N 2011 (Estimate)	Difference %
Aroma			
Alpha	2,1	2,1	
Total			

Alpha Prod.	Year N-1	2010	Year N	2011	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(Estimate)	%		%
Aroma						
Alpha	127,6		127,6			
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						
Alpha						

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:

SPAIN

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Metric tons	1.100					
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1) **2010**	**Aroma**	**Alpha**	**Total**
Total Hop Production			
- Sold Production			
= Unsold Hops			
% unsold Hops			

Hop Prices Euro / Kg	Year (N-2) 2009	Year (N-1) 2010	Year (N) 2011	% Diff. 2010 vs. 2009	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country & Date:

Member Organization:

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country: **UK**

Hop Area (Ha = Hectares)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	817	817	-	-
Alpha	252	252	-	-
Total	1069	1069		

New Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)
Aroma	20	-
Alpha	-	-
Total	20	-

TOTAL Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	817	817	-	-
Alpha	252	252	-	-
Total	1069	1069	-	-

Production MT = Metric Tons	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	1.150	1.150	-	-
Alpha	450	450	-	-
Total	1.600	1.600	-	-

Yield MT/Ha	Year N-1 2010	Year N 2011 (Estimate)	Difference %
Aroma	1,75		
Alpha	1,70		
Total			

Alpha Prod.	Year N-1	2010	Year N	2011	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(Estimate)	%		%
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						
Goldings	196	196		4,7		
East Kent Golding	80	80		5,8		
First Gold	127	127		8,6		
Fuggles	92	92		4,7		
Alpha						
Target	107	107		11,0		
Pilgrim	75	75		10,1		
Admiral	52	52		14,2		
Northdown	20	20		6,9		

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:
UK

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Metric tons						
% Crop / Year N	80	70	60	10	-	-

Unsold Hops (MT) : Crop Year (N-1) **2010**	**Aroma**	**Alpha**	**Total**
Total Hop Production	45	75	120
- Sold Production			
= Unsold Hops	2	3,5	5,5
% unsold Hops	4%	5%	9%

Hop Prices Euro / Kg	**Year (N-2) 2009**	**Year (N-1) 2010**	**Year (N) 2011**	**% Diff. 2010 vs. 2009**	**Kind of Price**
Spot Prices					
Aroma Hops	300 z	250 z			
Alpha Hops	30 ka	20 ka			
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Market very quiet.
Brewers have adequate stocks.

Prices: Aroma - pounds sterling per zentner.
Alpha - pounds sterling per kilo of alpha.

Country & Date: UK
17th January 2011

Member Organization: NHA
National Hop Association

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country: **USA**

Hop Area (Ha = Hectares)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	4.164	3.800	-364	-8,74%
Alpha	8.498	7.800	-698	-8,21%
Total	12.662	11.600	-1.062	-8,39%

New Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	4.164	3.800	-364	-8,74%
Alpha	8.498	7.800	-698	-8,21%
Total	12.662	11.600	-1.062	-8,39%

Production MT = Metric Tons	Year N-1 2010	Year N 2011 (Estimate)	Difference N - (N-1)	Difference %
Aroma	5.513	4.940		
Alpha	24.194	21.840		
Total	29.707	26.780		

Yield MT/Ha	Year N-1 2010	Year N 2011 (Estimate)	Difference %
Aroma	1,3	1,3	
Alpha	2,8	2,8	
Total	2,3	2,3	

Alpha Prod.	Year N-1	2010	Year N	2011	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(Estimate)	%		%
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						
Willamette	1.376					
Cascade	748					
Alpha						
Zeus	2.024					
Columbus/Tomahawk	1.416					
Summit	1.310					
Galena	971					
Nugget	884					

International Hop Growers' Convention

IHGC-Economic Commission: February 2011 - Hobart, Australia

Country:

USA

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1) **2010**	**Aroma**	**Alpha**	**Total**
Total Hop Production			
- Sold Production			
= Unsold Hops			
% unsold Hops			

Hop Prices Euro / Kg	**Year (N-2) 2009**	**Year (N-1) 2010**	**Year (N) 2011**	**% Diff. 2010 vs. 2009**	**Kind of Price**
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE	2.20 Euro/Kg	1.96 Euro/Kg	-0,24		Season average price

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Used exchange rate of $1 USD = 0.7362 Euro

Country & Date: USA
4.2.2011

Member Organization:
Hop Growers of America