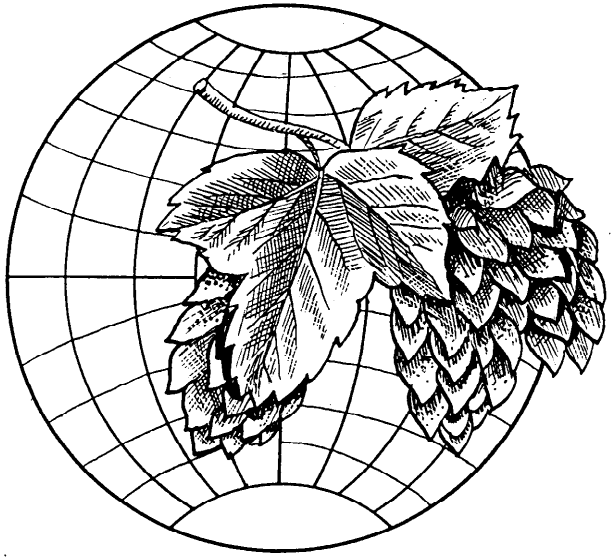
International Hop Growers' Convention



Economic Commission - Summary Reports

Linz, Austria
July, 2014

International Hop Growers' Convention

IHGC - Economic Commission Summary Reports

Linz, Austria - July, 29, 2014

Country	Hop Acreage 2013 (Hectares, Ha)					Hop Production 2013 (in MT = 1.000 kg)			Alpha acid Prod.	Hop Acreage 2014 (Hectares, Ha) estimations					Hop Production 2014 (in MT = 1.000 kg) estimations			Alpha acid Prod.
	Aroma	Alpha	Hop area'	New	**Total**	Aroma	Alpha	Total	MT	Aroma	Alpha	Hop area'	New	**Total**	Aroma	Alpha	Total	MT
Australia°	64	385	449	85	**449**	200	938	1 138	143	64	344	408	0	**408**	200	879	1 079	140
Austria	187	43	230	17	**247**	284	90	374	24	190	54	244	3	**247**	310	104	414	32
Belgium	70	88	158	0	**158**	93	118	211	24	77	71	148	7	**148**	65	83	148	14
China°	200	2 800	3 000	0	**3 000**	400	6 600	7 000	420	200	2 300	2 500	0	**2 500**	300	5 700	6 000	380
Czech Republic	4 065	54	4 119	200	**4 319**	5 243	87	5 330	196	3 964	50	4 014	406	**4 420**	5 420	80	5 500	210
France	300	59	359	22	**381**	519	93	612	27	322	59	381	58	**439**	590	100	690	33
Germany	8 795	6 945	15 740	1 109	**16 849**	12 297	15 257	27 554	2 720	9 199	6 900	16 099	1 209	**17 308**	16 500	17 500	34 000	3 600
New Zealand	288	90	378	0	**378**	523	180	703	70	288	82	370	0	**370**	587	178	765	74
Poland°	458	847	1 305	102	**1 407**	793	1 628	2 421	209	532	875	1 407	0	**1 407**	793	1 628	2 421	209
Romania	61	180	241	5	**245**	55	126	181	16	63	182	245	0	**250**	55	130	185	19
Russia°	84	54	138	20	**158**	92	70	162	9	84	54	138	20	**158**	92	70	162	9
Serbia°	34	33	67	12	**79**	58	76	134	11	34	33	67	12	**79**	58	76	134	11
Slovakia°	174	0	174	0	**174**	193	0	193	7	138	0	138	0	**138**	150	0	150	7
Slovenia	1 026	35	1 061	105	**1 165**	1 237	60	1 297	100	1 104	36	1 140	157	**1 296**	1 830	70	1 900	130
South Africa°	0	492	492	0	**492**	0	913	913	128	0	420	420	0	**420**	0	820	820	108
Spain	0	483	483	0	**483**	0	848	848	104	0	520	520	37	**520**	0	960	960	118
Ukraine°	377	82	459	10	**469**	430	90	520	35	309	60	369	0	**369**	400	80	480	30
UK–England°	740	242	982	0	**982**	835	400	1 235	96	740	242	982	0	**982**	835	400	1 235	96
USA*	8 092	6 162	14 254	0	**14 254**	14 571	16 883	31 454	3 680	10 393	5 500	15 893	0	**15 893**	18 707	15 070	33 777	3 680
IHGC	**25 015**	**19 074**	**44 089**	**1 687**	**45 689**	**37 823**	**44 457**	**82 280**	**8 019**	**27 701**	**17 782**	**45 483**	**1 909**	**47 352**	**46 892**	**43 928**	**90 820**	**8 900**

° Since no country updates were available, figures from Paris were used.

' Acreage without new hop areas

* No new hop area has been included at the U.S. report (however aroma acreage increased by 2.301 ha as for 2013/2014)

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:

Austria

Hop Area (Ha = Hectares)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	187	190	3	1,6
Alpha	43	54	11	25,6
Total	230	244	14	6,1

New Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*
Aroma	6	3
Alpha	11	0
Total	17	3

TOTAL Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	193	193	0	0,0
Alpha	54	54	0	0,0
Total	247	247	0	0,0

Production MT = Metric Tons	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	284	310	26	9,2
Alpha	90	104	14	15,6
Total	374	414	40	10,7

Yield MT/Ha	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference %**
Aroma	1,5	1,6	6,3
Alpha	2,1	1,9	-10,5
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						
Aroma						
Celeja	51	51				
Perle	43	42				
Aurora	27	26				
Malling	21	20				
Spalter Select	20	22				
Tradition	14	15				
Alpha						
Magnum / Taurus	54	55				

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
Austria

Alpha Prod.	**Year N-1**	**2013**	**Year N**	**2014**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	*(estimate)*	**%**		**%**
Aroma	12,5	4,4	18,6	6,0	6,1	48,8
Alpha	11,4	12,7	13,5	13,0	2,1	18,3
Total	23,9		32,1			

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
Metric tons	400	420	420	420		
% Crop / Year N	97					

Unsold Hops (MT) : Crop Year (N-1) **2013**	**Aroma**	**Alpha**	**Total**
Total Hop Production			
- Sold Production			
= Unsold Hops			
% unsold Hops			

Hop Prices Euro / Kg	**Year (N-2) 2012**	**Year (N-1) 2013**	**Year (N) 2014**	**% Diff. 2014 vs. 2013**	**Kind of Price**
Spot Prices					
Aroma Hops	6,5				
Alpha Hops	0				
Average Price	6,5				
Contract Prices					
Aroma Hops	6,3	6,2	**6,2**	0	Erzeugerpreis / kg RH
Alpha Hops	6,3	5,3	**4,8**	-10	Erzeugerpreis / kg RH
Average Price	6,3	6,1			
Average Prices					
Aroma Hops	6,3				
Alpha Hops	9,2				
AVERAGE	7,7				

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: Member Organization:

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:

Belgium

Hop Area (Ha = Hectares)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	70	77	7	
Alpha	88	71	-17	
Total	158	148	-10	

New Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*
Aroma		7
Alpha		-17
Total		-10

TOTAL Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	70	77		
Alpha	88	71		
Total	158	148		

Production MT = Metric Tons	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	93	65	-28	
Alpha	118	83	-35	
Total	211	148	-63	

Yield MT/Ha	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference %**
Aroma		1,2	
Alpha		1,7	
Total		1,4	

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						
Golding	26,05	24,8				
Challenger	24	21,5				
Alpha						
Target	38	38				
Magnum	21	21				

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
Belgium

Alpha Prod.	**Year N-1**	**2013**	**Year N**	**2013**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	*(estimate)*	**%**		**%**
Aroma			3,5	4,5		
Alpha			10,0	10,0		
Total			13,5			

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
Metric tons	40	30	20	10	10	0
% Crop / Year N	30	20	20	10	10	0

Unsold Hops (MT) : Crop Year (N-1) **2013**	**Aroma**	**Alpha**	**Total**
Total Hop Production			
- Sold Production			
= Unsold Hops	0	0	0
% unsold Hops	0	0	0

Hop Prices Euro / Kg	**Year (N-2) 2012**	**Year (N-1) 2013**	**Year (N) 2014**	**% Diff. 2014 vs. 2013**	**Kind of Price**
Spot Prices					
Aroma Hops	4,5	4,5	5,5		
Alpha Hops	1	1	-		
Average Price					
Contract Prices					
Aroma Hops	4,5	4,5	5,5		
Alpha Hops	-	-	-		
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Hail damage on 8 and 9 June 2014 on 30% of the surface.
The expectation of the production on the damaged surface is 10%.
The damaged surface area of hops: 60 % aroma hops and 40% alpha hops.

Country, Date: 25

Member Organization: Eric Lagache

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:

Czech Republic

Hop Area (Ha = Hectares)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	4065	3964	-101	
Alpha	54	50	-4	
Total	4119	4014	-105	

New Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*
Aroma	200	406
Alpha	0	0
Total	200	406

TOTAL Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	4265	4370	105	
Alpha	54	50	-4	
Total	4319	4420	101	

Production MT = Metric Tons	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	5 243	5 420	177	
Alpha	87	80	-7	
Total	5 330	5 500	170	

Yield MT/Ha	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference %**
Aroma	1,22	1,20	
Alpha	1,70	1,80	
Total	1,23	1,20	

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	3786	3880	94			
Sládek	240	272	32			
Premiant	201	187	-14			
Kazbek	2	18	16			
Alpha						
Agnus	44	40	-4			

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
Czech Republic

Alpha Prod.	**Year N-1**	**2013**	**Year N**	**2013**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	*(estimate)*	**%**		**%**
Aroma	187,0	3,9	200,0	4,0		
Alpha	9,0	11,5	10,0	12,0		
Total	196,0	4,02	210,0	4,1		

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
Metric tons						
% Crop / Year N	100	100	98	95	75	65

Unsold Hops (MT) : Crop Year (N-1) **2013**	**Aroma**	**Alpha**	**Total**
Total Hop Production			
- Sold Production			
= Unsold Hops			
% unsold Hops			0

Hop Prices Euro / Kg	**Year (N-2) 2012**	**Year (N-1) 2013**	**Year (N) 2014**	**% Diff. 2014 vs. 2013**	**Kind of Price**
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops		6	6,5		farmer price
Alpha Hops		3,5	4		farmer price
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
21.7.2014

Member Organization:
Hop Growers Union of the Czech Rep.

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:

France

Hop Area (Ha = Hectares)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	300	322	22	107,3%
Alpha	59	59	0	100,0%
Total	359	381	0	106,1%

New Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*
Aroma	22	58
Alpha	0	0
Total	0	58

TOTAL Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	322	380	58,0	15,3%
Alpha	59	59	0,0	0,0%
Total	381	439	58,0	13,2%

Production MT = Metric Tons	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	519	590	71	113,7%
Alpha	93	100	7	107,5%
Total	612	690	78	112,7%

Yield MT/Ha	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference %**
Aroma	1,6	1,8	
Alpha	1,6	1,7	
Total	1,6	1,8	

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	115	175	60	1,40		
Aramis	49	47	-2	6,50		
Tradition	41,5	35	-6,5	3,75		
Fuggle	33	35	2	3,58		
Golding	30	35	5	2,20		
Alpha						
Columbus	24	17	-7	10,40		
Brewers Gold	10,8	9,5	-1,3	5,48		
Nugget	21	19	-2	11,30		
Magnum	5,3	5,3	0	17,70		

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
France

Alpha Prod.	**Year N-1**	**2013**	**Year N**	**2013**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	*(estimate)*	**%**		**%**
Aroma	16,9	3,26	22,3	3,8	5,4	132,0%
Alpha	10,0	10,75	10,6	10,6	0,6	106,0%
Total	26,9	4,40	32,9	4,8	6,0	122,3%

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
Metric tons	480	500	450			
% Crop / Year N	70%	70%	60%			

Unsold Hops (MT) : Crop Year (N-1) **2013**	**Aroma**	**Alpha**	**Total**
Total Hop Production	496	116	612
- Sold Production	450	116	566
= Unsold Hops	30	0	46
% unsold Hops	6,05%	0%	8%

Hop Prices Euro / Kg	**Year (N-2) 2012**	**Year (N-1) 2013**	**Year (N) 2014**	**% Diff. 2014 vs. 2013**	**Kind of Price**
Spot Prices					
Aroma Hops	3,00	4,00	5		
Alpha Hops	2,00	1,60	2,5		
Average Price					
Contract Prices					
Aroma Hops	4,50	5,00	5,50/6,00		
Alpha Hops	3,60	4,00			
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
Strasbourg Juillet 7, 2014

Member Organization:
Francis Heitz
on behalf of AGPH

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
Germany

Hop area (ha)	Year N-1 2013	Year N 2014	Difference N - (N-1)	Difference %
Aroma	8795	9199	404	4,6
Alpha	6945	6900	-45	-0,6
Total	15740	16099	359	2,3

New Hop Area (ha)	Year N-1 2013	Year N 2014
Aroma	557	677
Alpha	552	532
Total	1109	1209

TOTAL Hop area (ha)	Year N-1 2013	Year N 2014	Difference N - (N-1)	Difference %
Aroma	9352	9876	524	5,6
Alpha	7497	7432	-65	-0,9
Total	16849	17308	459	2,7

Production MT	Year N-1 2013	Year N 2014 estimate	Difference N - (N-1)	Difference %
Aroma	12 297	16 500	4 203	34,2
Alpha	15 257	17 500	2 243	14,7
Total	27 554	34 000	6 446	23,4

Yield MT/HA.	Year N-1 2013	Year N 2014 estimate	Difference %
Aroma	1,3	1,7	27,1
Alpha	2,0	2,4	15,7
Total	1,6	2,0	20,1

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						
Perle	3048	3154	106	5,4	8,1	2,7
Hall.Tradition	2661	2825	164	5	6,7	1,7
Hersbrucker	847	924	77	1,9	3	1,1
Hallertauer	925	838	-87	3,3	4,6	1,3
Tettnanger	787	762	-25	2,6	4,3	1,7
Spalter Select	496	523	27	3,3	5,1	1,8
Saphir	324	381	57	2,6	4,4	1,8
Spalter	112	112	0	2,8	4,1	1,3
Mand. Bavaria	35	99	64			0
Alpha						
Herkules	3086	3622	536	16,5	17,1	0,6
Hall. Magnum	3102	2642	-460	12,6	14,3	1,7
Hall.Taurus	709	594	-115	15,9	17	1,1
North. Brewer	281	267	-14	6,6	9,9	3,3
Nugget	184	173	-11	9,3	12,2	2,9
Polaris	43	53	10			0
Hall. Merkur	38	31	-7			0
Brewers Gold	19	17	-2			0
Comet	3	3	0			0

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
Germany

Alpha Prod.	Year N-1	2013	Year N	2014	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*0*	%		%
Aroma	532,3	4,3	1000,0	6,1	467,7	1,7
Alpha	2187,4	14,3	2600,0	14,9	412,6	0,5
Total	2 720	9,9	3600,0	10,6	880,3	0,7

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2014	2015	2016	2017	2018	2019
Metric Tons	26507					
% Crop / Year N	78					

Unsold Hops (MT) : Crop Year (N-1) 2013	Aroma	Alpha	Total
Total Hop Production	12297,00	15 257	27 554
- Sold Production	12297,00	15 257	27 554
= Unsold Hops	0,00	0,00	0,00
% unsold Hops	0	0	0

Hop Prices Euro / Kg	Year (N-2) 2012	Year (N-1) 2013	Year (N) 2014	% Diff. 2014 vs. 2013	Kind of Price
Spot Prices					
Aroma Hops	2,08	4,4		111,50	Farmer Price
Alpha Hops	1,84	2,66		44,60	Farmer Price
Average Price	1,93	3,18		64,80	Farmer Price
Contract Prices					
Aroma Hops	4,62	4,56		-1,30	Farmer Price
Alpha Hops	4,3	4,13		-4,00	Farmer Price
Average Price	4,46	4,33		-2,90	Farmer Price
Average Prices					
Aroma Hops	4,22	4,53		7,30	Farmer Price
Alpha Hops	3,71	3,87		4,30	Farmer Price
AVERAGE	3,95	4,16		5,30	Farmer Price

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: **Verband deutscher Hopfenpflanzer**

Germany 23.7.2014 gez. Brunner

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:

New Zealand

Hop Area (Ha = Hectares)	**Year N-1 2013**	**Year N 2014** *(Actual)*	**Difference N - (N-1)**	**Difference %**
Aroma	288	288	0	
Alpha	90	82	-8	
Total	378	370		

New Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(Actual)*
Aroma		0
Alpha		0
Total		0

TOTAL Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(Actual)*	**Difference N - (N-1)**	**Difference %**
Aroma				
Alpha				
Total				

Production MT = Metric Tons	**Year N-1 2013**	**Year N 2014** *(Actual)*	**Difference N - (N-1)**	**Difference %**
Aroma	523	587	64	
Alpha	180	178	-2	
Total	703	765	62	

Yield MT/Ha	**Year N-1 2013**	**Year N 2014** *(Actual)*	**Difference %**
Aroma	1,8	2,0	
Alpha	2,0	2,1	
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						
Wakatu	145	106	-39			
Nelson Sauvin	49	76	27			
Motueka	30	38				
Alpha						
Pacific Gem	25	17	-8			

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
New Zealand

Alpha Prod.	**Year N-1**	**2013**	**Year N**	**2013**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	*(Actual)*	**%**		**%**
Aroma		8,0		8,0		
Alpha		15,5		15,0		
Total						

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1) **2014**	**Aroma**	**Alpha**	**Total**
Total Hop Production	587	178	765
- Sold Production	537	160	697
= Unsold Hops	50	18	68
% unsold Hops	9	11	9

Hop Prices Euro / Kg	**Year (N-2) 2012**	**Year (N-1) 2013**	**Year (N) 2014**	**% Diff. 2014 vs. 2013**	**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

Production situation:

Production remains focussed on increasing aroma varieties and decreasing alpha varieties.
The harvest was completed by the end of of March with what was at best considered an average crop with some noticable increases in yield and alpha in the Wakatu variety. 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 integrated pest management system which nets a certified spray free crop.

Market Conditions:

International market conditions remain favourable for New Zealand Hops entering 2014 harvest with a 90 % sold forward position. The industry expecation is that the complete crop will be sold prior to the 2015 harvest.

Country, Date:
New Zealand April 2014

Member Organization:
Doug Donelan NZ Hops Ltd.

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:

Romania

Hop Area (Ha = Hectares)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	61	63	2	
Alpha	180	182	2	
Total	241	245	4	

New Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*
Aroma	0	0
Alpha	5	0
Total	5	0

TOTAL Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	63	63	0	0,0
Alpha	182	187	5	2,7
Total	245	250	5	2,0

Production MT = Metric Tons	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	55	55	0	0
Alpha	126	130	4	3
Total	181	185	4	2

Yield MT/Ha	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference %**
Aroma	0,873	0,873	
Alpha	0,692	0,695	
Total	0,739	0,740	

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	33	0	7,80	8,20	0,40
Huller Bitter	30	30	0	7,05	7,00	-0,05
	63	63	0	7,50	8,00	0,50
Alpha						
H Magnum	64	69	5	12,30	13,00	0,70
H Merkur	29	29	0	11,50	12,00	0,50
Brewers Gold	89	89	0	7,10	7,50	0,40
	182	187	5	11,50	10,11	-1,39

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
Romania

Alpha Prod.	**Year N-1**	**2013**	**Year N**	**2013**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	*(estimate)*	**%**		**%**
Aroma	4,4	7,50	4,4	8,0	0,0	0,50
Alpha	11,9	11,50	14,3	11,0	2,5	-0,50
Total	16,2	8,96	18,7	10,1	2,5	1,15

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
Metric tons	190	200	220	240	240	240
% Crop / Year N	97	95	86	86	86	86

Unsold Hops (MT) : Crop Year (N-1)	**2013**	**Aroma**	**Alpha**	**Total**
Total Hop Production	0	0	0	0
- Sold Production	0	0	0	0
= Unsold Hops	0	0	0	0
% unsold Hops	0	0	0	0

Hop Prices Euro / Kg	**Year (N-2) 2012**	**Year (N-1) 2013**	**Year (N) 2014**	**% Diff. 2014 vs. 2013**	**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:
15.julie 2014

Member Organization:

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:

Slovenia

Hop Area (Ha = Hectares)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	1026	1104	78	
Alpha	35	36	1	
Total	1061	1140	79	

New Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*
Aroma	102	155
Alpha	3	2
Total	105	157

TOTAL Hop Area (Ha)	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma	1126	1258	132	
Alpha	39	38	-1	
Total	1165	1296	131	

Production MT = Metric Tons	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference N - (N-1)**	**Difference %**
Aroma				
Alpha				
Total	1297	1900		

Yield MT/Ha	**Year N-1 2013**	**Year N 2014** *(estimate)*	**Difference %**
Aroma			
Alpha			
Total	1.2	1.7	

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	582	578	-4			
Styrian Sav. Golding	128	146	18			
Styrian Golding	312	403	91			
Styrian Golding B	90	104	14			
Alpha						
H. Magnum	17	15	-2			
Extra Styrian Dana	10	11	1			

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
Slovenia

Alpha Prod.	**Year N-1**	**2013**	**Year N**	**2013**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	*(estimate)*	**%**		**%**
Aroma						
Alpha						
Total	100	4.5	130,0			

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
Metric tons						
% Crop / Year N	85	75	60	50		

Unsold Hops (MT) : Crop Year (N-1) **2013**	**Aroma**	**Alpha**	**Total**
Total Hop Production			1297
- Sold Production			1297
= Unsold Hops			0
% unsold Hops			0

Hop Prices Euro / Kg	**Year (N-2) 2012**	**Year (N-1) 2013**	**Year (N) 2014**	**% Diff. 2014 vs. 2013**	**Kind of Price**
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices	3,5	4,5	5,6		
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Hop growers sold in 2013 all their noncontracted hops.
Final hop statistics for 2013 relate to 1.8.2013

Country, Date:
Slovenia, July 21, 2014

Member Organization:
Hop Growers of Slovenia /
Hmezad exim / Inbarco

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country: SPAIN

Hop Area (Ha = Hectares)	Year N-1 2013	Year N 2014 *(estimate)*	Difference N - (N-1)	Difference %
Aroma				
Alpha	483	520	7,0	
Total	483	520	7,0	

New Hop Area (Ha)	Year N-1 2013	Year N 2014 *(estimate)*
Aroma		
Alpha		37
Total		37

TOTAL Hop Area (Ha)	Year N-1 2013	Year N 2014 *(estimate)*	Difference N - (N-1)	Difference %
Aroma				
Alpha	483	520	37	7,0
Total	483	520	37	7,0

Production MT = Metric Tons	Year N-1 2013	Year N 2014 *(estimate)*	Difference N - (N-1)	Difference %
Aroma				
Alpha	848	960	112	12,5
Total	848	960	112	12,5

Yield MT/Ha	Year N-1 2013	Year N 2014 *(estimate)*	Difference %
Aroma			
Alpha	1,8	1,8	
Total	1,8	1,8	

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						
Alpha	483	520	37			

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country: SPAIN

Alpha Prod.	Year N-1	2013	Year N	2013	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma						
Alpha	104,0		118,0		14,0	
Total	104,0		118,0		14,0	

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2014	2015	2016	2017	2018	2019
Metric tons	1000	1000				
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2013	Aroma	Alpha	Total
Total Hop Production				
- Sold Production			520	520
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2012	Year (N-1) 2013	Year (N) 2014	% Diff. 2014 vs. 2013	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices	3,49	3,8	3,9		
Aroma Hops					
Alpha Hops	3,49	3,8	3,9		
Average Price					
Average Prices	3,49	3,8	3,9		
Aroma Hops					
Alpha Hops	3,49	3,8	3,9		
AVERAGE	3,49	3,8	3,9		

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

A.P.A. 001
S.A.T. nº 6.594
GRUPO DE CULTIVADORES
DEL LÚPULO
C.I.F. F-24047425
Las Eras,10
24270 CARRIZO DE LA RIBERA
LEÓN

Country, Date:

26/06/14

Member Organization:

A.P.A. 001
S.A.T. nº 6.594
GRUPO DE CULTIVADORES
DEL LÚPULO
C.I.F. F-24047425
Las Eras,10
24270 CARRIZO DE LA RIBERA
LEÓN

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:

USA

Hop Area (Ha = Hectares)	Year N-1 2013	Year N 2014 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	8 092	10 393	2 301	28,4%
Alpha	6 162	5 500	-662	-10,7%
Total	14 254	15 893	1 639	11,5%

New Hop Area (Ha)	Year N-1 2013	Year N 2014 *(estimate)*
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2013	Year N 2014 *(estimate)*	Difference N - (N-1)	Difference %	
Aroma	8 092	10 393	2 301	28,4%	*65% of area*
Alpha	6 162	5 500	-662	-10,7%	*35% of area*
Total	14 254	15 893	1 639	11,5%	

Production MT = Metric Tons	Year N-1 2013	Year N 2014 *(estimate)*	Difference N - (N-1)	Difference %	
Aroma	14 571	18 707	4136	28,4%	*55% of prod.*
Alpha	16 883	15 070	-1813	-10,7%	*45% of prod.*
Total	31 454	33 777	2323	7,4%	

Yield MT/Ha	Year N-1 2013	Year N 2014 *(estimate)*	Difference %
Aroma	1,80	1,80	0,0%
Alpha	2,74	2,74	0,0%
Total	2,20	2,13	-3,2%

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						
Cascade	2 140	3 090		7,1		
Centennial	880	1 400		9,3		
Citra® (HBC 394)	585	735				
Chinook	703	720		11,5		
Cluster	325	294		7,0		
Mosaic™ (HBC 369)	155	272				
Simcoe® (YCR 14)	525	744				
Willamette	435	475		4,8		
Alpha						
Apollo	404	398		17,9		
Bravo	241	287		15,2		
CTZ	2 493	2 343		15,5		
Nugget	834	670		14,4		
Summit	1 151	1 073		16,7		
Super Galena	490	367		13,8		

International Hop Growers' Convention

IHGC-Economic Commission: July 2014 - Linz, Austria

Country:
USA

Alpha Prod.	**Year N-1**	**2013**	**Year N**	**2013**	**Difference**	**N-(N-1)**
Metric Tons	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**	**Metric Tons**	**Av. Contents**
		%	*(estimate)*	**%**		**%**
Aroma						
Alpha						
Total	3 680	10,8	3 680	10,8		

Contract	**Year N**	**Year N+1**	**Year N+2**	**Year N+3**	**Year N+4**	**Year N+5**
Situation	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
Metric tons						
% Crop / Year N	98	88	85	40-50	30-40	30-40

Unsold Hops (MT) : Crop Year (N-1) **2013**	**Aroma**	**Alpha**	**Total**
Total Hop Production			
- Sold Production			
= Unsold Hops			
% unsold Hops			

Hop Prices Euro / Kg	**Year (N-2) 2012**	**Year (N-1) 2013**	**Year (N) 2014**	**% Diff. 2014 vs. 2013**	**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	5.26 Euro/kg.	5.77 Euro/kg			

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate $1 USD = 0.73 Euro (29 December 2013)

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 21.7.14

Member Organization:
Hop Growers of America

US Hop Acreage Estimate - 2014 Strung For Harvest
Prepared by Hop Growers of America
Contact Ann George, 509-453-4749, ageorge@wahops.org
June 16, 2014

STATE & VARIETY	ACRES STRUNG FOR HARVEST		2013-14	2014 Hectares
	2013	2014	% +/-	
CALIFORNIA		65		26
COLORADO		75		30
IDAHO #				
Apollo	314	285	-9,24%	115
Bravo	130	126	-3,08%	51
Cascade	628	821	30,73%	332
Centennial	57	92	61,40%	37
Chinook	324	344	6,17%	139
Citra® (HBC 394)	19	89	368,42%	36
Crystal	*	30		12
El Dorado®	14	63	350,00%	25
Simcoe® (YCR 14)	*	67		27
Super Galena	278	176	-36,69%	71
Zeus	548	662	20,80%	268
Experimental	5	41	720,00%	17
Other Varieties	1059	1016	-4,06%	411
TOTAL IDAHO #	3 376	3 812	12,91%	1 543
ILLINOIS		10		4
INDIANA		8		3
MAINE		10		4
MICHIGAN		300		121
MINNESOTA		20		8
NEBRASKA		12		5
NEW YORK		150		61
NORTH CAROLINA		30		12
OHIO		30		12
OREGON #				
Cascade	423	991	134,28%	401
Centennial	249	458	83,94%	185
Chinook	*	119		48
Citra® (HBC 394)	*	36		15
Crystal	91	261	186,81%	106
Golding	194	234	20,62%	95
Magnum	104	176	69,23%	71
Mt. Hood	221	269	21,72%	109
Nugget	1 667	1 392	-16,50%	563
Perle	55	100	81,82%	40
Sterling	122	130	6,56%	53
Super Galena	155	125	-19,35%	51
Tettnanger	*	98		40
Willamette	553	568	2,71%	230
Experimental	35	*		
Other Varieties	917	602	-34,35%	244
TOTAL OREGON #	4 786	5 559	16,15%	2 250
VERMONT		25		10

VIRGINIA		25		10
WASHINGTON #				
Ahtanum	211	192	-9,00%	78
Apollo	685	700	2,19%	283
Azacca™ Brand ADHA 483**	*	77		31
Bravo	466	584	25,32%	236
Cascade	4 237	4 839	14,21%	1 958
Centennial	1 869	2 839	51,90%	1 149
Chinook	1 415	1 300	-8,13%	526
Citra® (HBC 394)	1 296	1 690	30,40%	684
Cluster	802	726	-9,48%	294
Columbus/Tomahawk®	2 336	1 732	-25,86%	701
Crystal	214	188	-12,15%	76
El Dorado®	82	101	23,17%	41
Galena	440	306	-30,45%	124
Glacier	98	126	28,57%	51
Golding	105	94	-10,48%	38
Jarrylo™ Brand ADHA 881**	*	75		30
Magnum	*	109		44
Mosaic™ (HBC 369)	382	671	75,65%	272
Millennium	420	113	-73,10%	46
Mt. Hood	168	150	-10,71%	61
Northern Brewer	170	131	-22,94%	53
Nugget	395	265	-32,91%	107
Simcoe® (YCR 14)	1 298	1 771	36,44%	717
Summit™ 2	2 844	2 652	-6,75%	1 073
Super Galena	779	606	-22,21%	245
Tettnanger	95	141	48,42%	57
Vanguard	76	58	-23,68%	23
Willamette	522	594	13,79%	240
YCR-4 - Palisade®	132	223	68,94%	90
YCR-5 - Warrior®	180	*		
Zeus	3 277	3 396	3,63%	1 374
Experimental	258	437	69,38%	177
Other	1 810	2 135	17,96%	864
TOTAL WASHINGTON #	27 062	29 021	7,24%	11 744
WISCONSIN		120		49
TOTAL UNITED STATES	**35 224**	**39 272**	**11,49%**	15 893

* Withheld to avoid disclosing data for individual operations.

** These varieties were included in the USDA-NASS report as "Other", but are listed separately in this report at the request of the American Dwarf Hop Association and the growers who are producing them.

Figures for WA, OR and ID from USDA-NASS June 2014 Acreage Strung for Harvest Report, released on June 12, 2014. Information for other states are estimates provided to Hop Growers of America by various sources and include several varieties.