DHWV
Deutscher Hopfenwirtschaftsverband

Mitteilungen des Verbandes – RS 14 vom 08.08.2019

Inhalt: IHGC-Summary Reports, Žalec

Sehr geehrte Damen und Herren,

Ende Juli fand der IHGC-Kongress in Žalec/Slowenien statt.

Gerne senden wir Ihnen im Nachgang zu diesem Kongress die IHGC-Summary Reports zu.
Den von uns dort präsentierten Marktbericht haben wir Ihnen bereits mit dem RS 12 zukommen lassen.

Freundliche Grüße



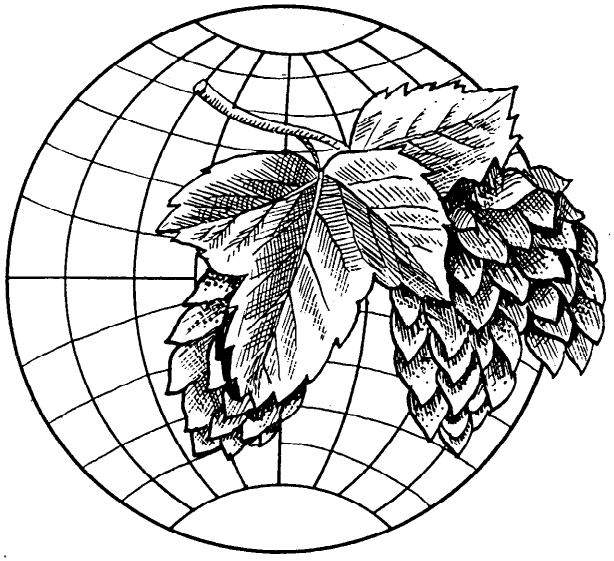
Korbinian Meier
Geschäftsführer
Deutscher Hopfenwirtschaftsverband e. V.

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INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

ŽALEC, SLOVENIA
JULY, 2019

International Hop Growers' Convention

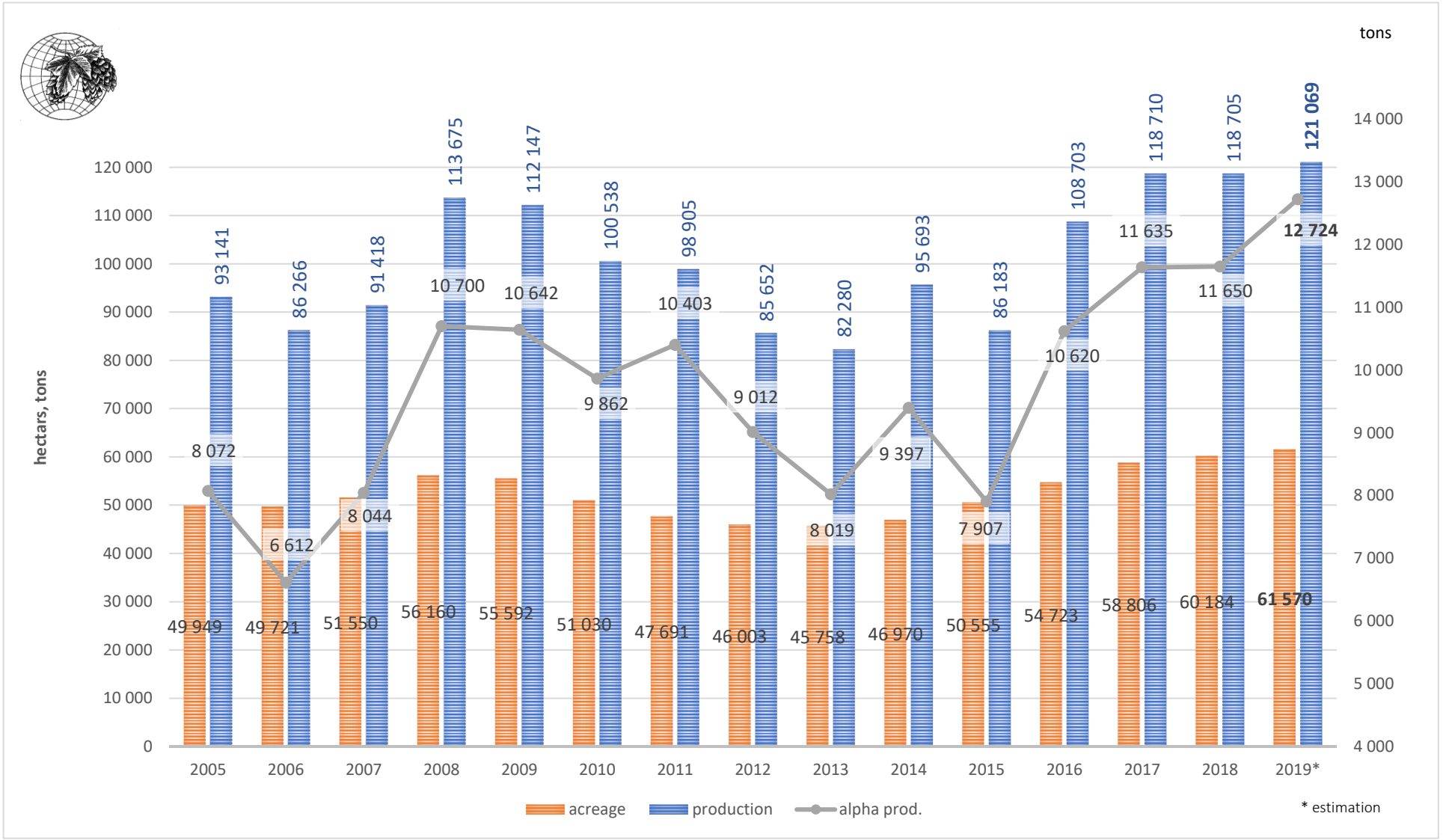
IHGC - Economic Commission Summary Reports

Žalec, Slovenia - July 30, 2019

Country	Hop Acreage 2018 (Hectares, Ha)					Hop Production 2018 (in MT = 1.000 kg)			Alpha acid Prod.	Hop Acreage 2019 (Hectares, Ha) estimations					Hop Production 2019 (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
Argentina	100	60	160	0	**160**	180	100	**280**	**25**	100	60	160	0	**160**	110	50	**160**	**10**
Australia	454	177	631	21	**652**	1 159	423	**1 582**	**225**	476	176	652	48	**700**	1 385	260	**1 645**	**217**
Austria	192	58	250	7	**250**	380	70	**450**	**30**	194	58	253	3	**253**	360	95	**455**	**36**
Belgium	126	54	180	0	**180**	163	119	**282**	**18**	124	58	182	0	**182**	180	138	**318**	**19**
Canada°	*219*	*200*	*419*	*0*	***419***	*329*	*300*	***629***	***63***	*219*	*200*	*419*	*0*	***419***	*329*	*300*	***629***	***63***
China°	*400*	*2 283*	*2 683*	*0*	***2 683***	*544*	*6 500*	***7 044***	***600***	*400*	*2 283*	*2 683*	*0*	***2 683***	*544*	*6 500*	***7 044***	***600***
Czech Republic	4 679	45	4 724	296	**5 020**	5 025	101	**5 126**	**185**	4 714	49	4 763	241	**5 004**	6 180	120	**6 300**	**280**
France	424	39	463	33	**496**	775	89	**864**	**25**	440	26	466	41	**506**	807	70	**877**	**36**
Germany	10 822	8 465	19 287	857	**20 144**	20 054	21 740	**41 794**	**4 000**	10 860	8 913	19 773	644	**20 417**	20 900	22 800	**43 700**	**5 000**
Japan	53	53	106	0	**106**	82	120	**202**	**25**	53	53	106	0	**106**	82	120	**202**	**25**
New Zealand	360	52	412	0	**412**	679	115	**794**	**70**	598	145	743	331	**743**	780	239	**1 019**	**100**
Poland	635	946	1 581	81	**1 662**	1 125	2 083	**3 208**	**280**	646	1 016	1 662	20	**1 682**	1 000	1 900	**2 900**	**244**
Romania	73	197	270	7	**277**	85	130	**215**	**19**	75	202	277	3	**280**	90	165	**255**	**29**
Russia	162	66	228	24	**252**	192	138	**330**	**18**	168	74	242	12	**254**	200	150	**350**	**20**
Serbia	0	0	8	0	**8**	0	0	**16**	**2**	0	0	8	0	**8**	0	0	**16**	**2**
Slovakia	137	0	137	0	**137**	127	0	**127**	**5**	129	0	129	4	**133**	105	0	**105**	**4**
Slovenia	1 526	21	1 547	120	**1 667**	3 018	60	**3 078**	**160**	1 500	21	1 521	75	**1 596**	2 440	60	**2 500**	**130**
South Africa°	*73*	*354*	*427*	*0*	***427***	*77*	*677*	***754***	***75***	*73*	*354*	*427*	*0*	***427***	*77*	*677*	***754***	***75***
Spain	0	536	536	0	**536**	0	900	**900**	**109**	0	532	532	0	**532**	0	900	**900**	**109**
Ukraine°	*309*	*60*	*369*	*0*	***369***	*400*	*80*	***480***	***30***	*309*	*60*	*369*	*0*	***369***	*400*	*80*	***480***	***30***
UK–England	948	0	948	0	**948**	1 377	0	**1 377**	**92**	953	0	953	0	**953**	1 430	0	**1 430**	**95**
USA	17 423	5 956	23 379	846	**23 379**	33 272	15 901	**49 173**	**5 594**	18 489	5 674	24 163	0	**24 163**	33 280	15 750	**49 030**	**5 600**
IHGC	**39 115**	**19 622**	**58 745**	**2 292**	**60 184**	**69 043**	**49 646**	**118 705**	**11 650**	**40 520**	**19 954**	**60 483**	**1 422**	**61 570**	**70 679**	**50 374**	**121 069**	**12 724**
Difference ∑ 2019-**2018**										1 405	332	1 738	-870	**1 386**	1 636	728	**2 364**	**1 074**
Difference ∑ 2019-**2014**										13 130	2 341	15 480	-2 215	14 600	20 671	5 890	25 376	3 327
Difference ∑ 2018-**2009**										14 815	-8 493	6 332	-3 717	7 419	29 277	-20 371	8 922	2 082

° *Since no country updates were available, figures from Freising in 2019 were used.*

' Acreage without new hop areas



Summarized by Michal Kovarik

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Australia

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(final)*	Difference N - (N-1)	Difference %
Aroma	454	476	22	4,8
Alpha	177	176	-1	-0,6
Total	631	652	21	3,3

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(final)*
Aroma	22	72
Alpha	-1	-24
Total	21	48

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(final)*	Difference N - (N-1)	Difference %
Aroma	476	548	72	15,1
Alpha	176	152	-24	-13,6
Total	652	700	48	7,4

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(final)*	Difference N - (N-1)	Difference %
Aroma	1 159	1 385	226	19,5
Alpha	423	260	-163	-38,5
Total	1 582	1 645	63	4,0

Yield MT/Ha	Year N-1 2018	Year N 2019 *(final)*	Difference %
Aroma	2,43	2,53	3,8
Alpha	2,40	1,71	-28,8
Total	2,43	2,35	-3,1

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(final)*	%		%
Aroma						
Alpha						
Total	225,4	14,2	217,1	13,2	-8,3	-3,7

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						
Galaxy™	294	316	22			
Vic Secret™	75	75	0			
Enigma™	35	53	18			
Ella™	50	50	0			
Alpha						
Super Pride	92	92	0			
Pride of Ringwood	60	60	0			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

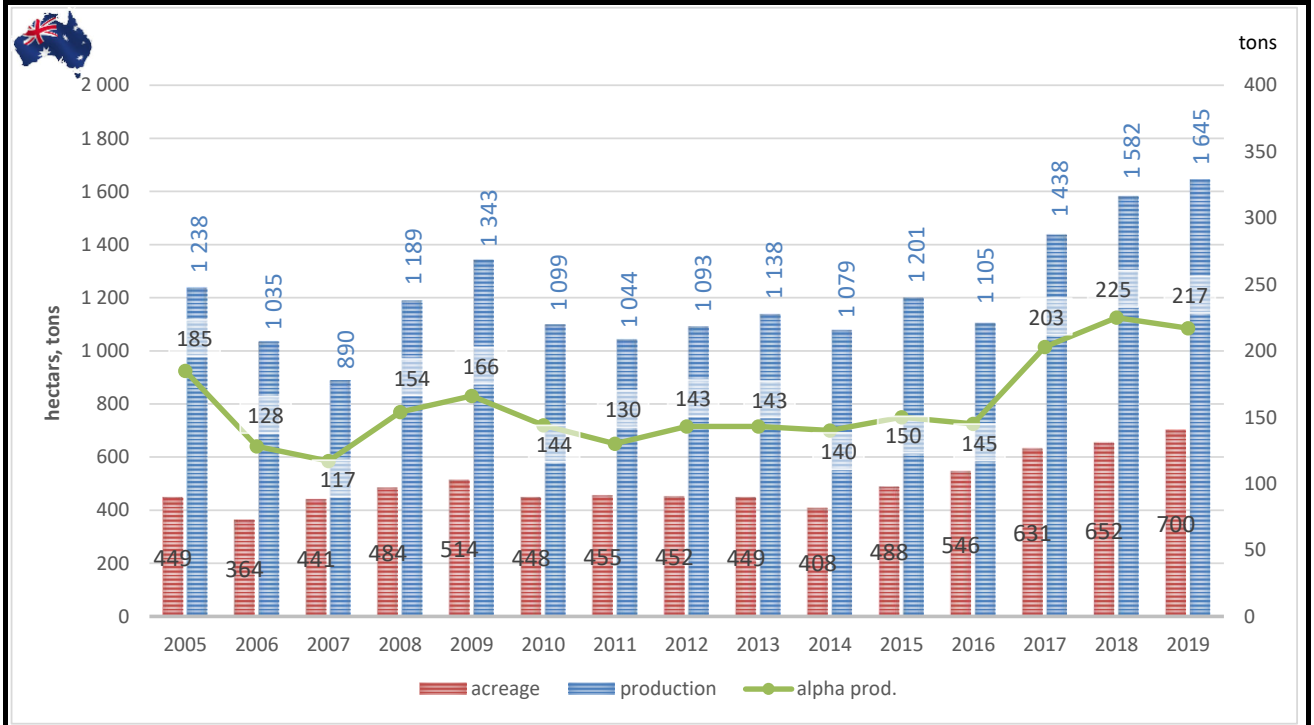
Country:
Australia

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N	100	90	80	80		

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:
Australia, 16.7.2019

Member Organization(s):
BARTH-HAAS Group

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Austria

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	192	194	3	1,3
Alpha	58	58	0	0,0
Total	250	253	3	1,0

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma	6,2	2,5
Alpha	0,6	0
Total	6,8	2,5

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	192	194	3	1,3
Alpha	58	58	0	0,0
Total	250	253	3	1,0

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	380	360	-20	-5,3
Alpha	70	95	25	35,7
Total	450	455	5	1,1

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,90	1,80	-5,3
Alpha	1,40	1,70	21,4
Total	1,65	1,75	6,1

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma	19,9	5,8	21,0	6,0	1,1	5,5
Alpha	10,5	12,3	14,5	13,7	4,0	38,1
Total	30,4		35,5		5,1	16,8

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						
Celeja	55	56	1			
Perle	41	41	0			
Aurora	25	25	0			
Malling	20	20	0			
Spalter Select	20	20	0			
Tradition	17	19	2			
Alpha						
Magnum/Taurus	58	58	0			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

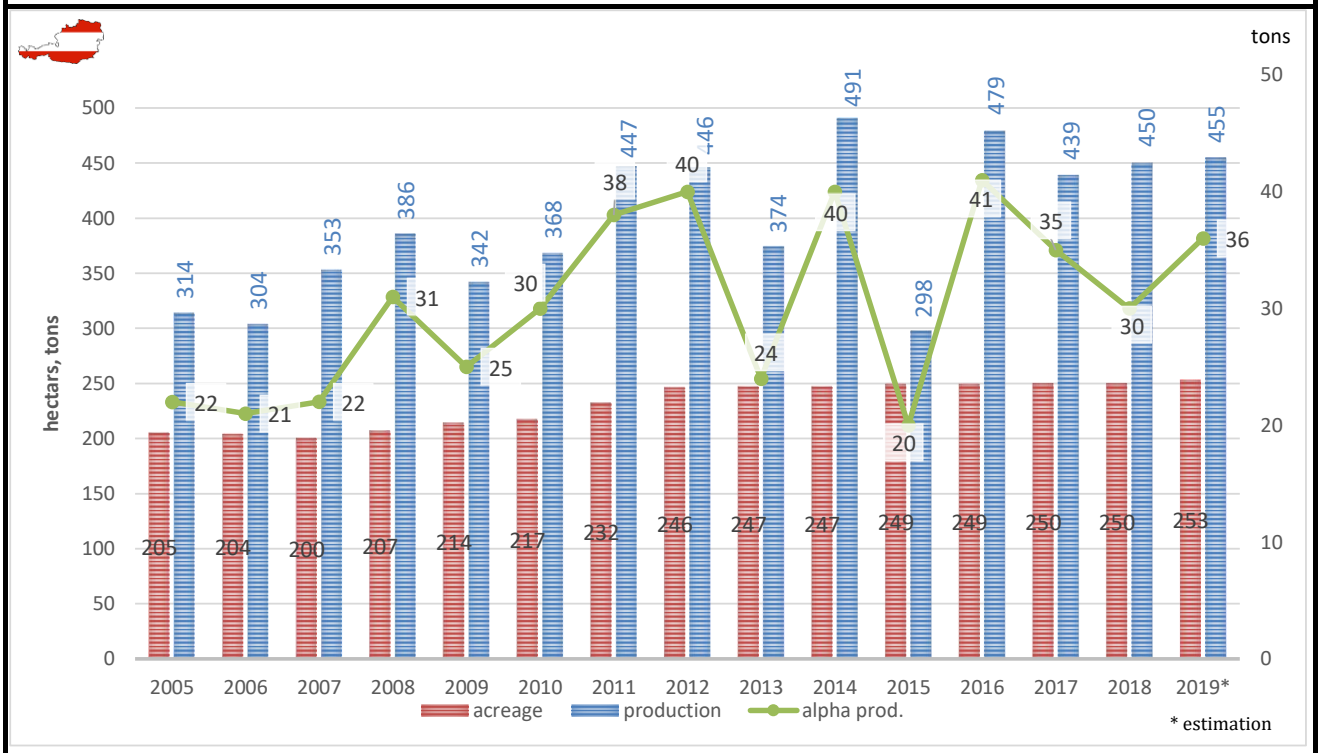
Country: **Austria**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons	410	395	340	200	175	100
% Crop / Year N	98	85	75	50		

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops				0
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops	**7,2**	7,4	7,5	1,4	
Alpha Hops	**7,5**	7,5	7,6	1,3	
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	11,7	12,3
O-Production (MT)	14	14

Main O-varieties

Perle Spalter Select
Aurora Malling Cascade

Country, Date:

Member Organization(s):
Hopfenbaugenossenschaft eGen

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Belgium

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	126	124	-1,4	-1,1
Alpha	54	58	3,4	6,3
Total	180	182	2	1,1

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma	0	0
Alpha	0	0
Total	0	0

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	126	124	-1	-1,1
Alpha	54	58	3	6,3
Total	180	182	2	1,1

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	163	180	17	10,4
Alpha	119	138	19	16,0
Total	282	318	36	12,8

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,30	1,45	11,5
Alpha	2,20	2,40	9,1
Total	1,57	1,75	11,5

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma	6,7	4,1	7,5	5,0	0,8	11,9
Alpha	11,5	9,7	11,6	11,0	0,1	0,4
Total	18,2		19,1		0,9	4,7

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						
Golding	52,3	50,2	-2,1			
Challenger	17,3	16,7	-0,6			
Cascade	7,8	8,5	0,7			
Alpha						
Magnum	18,4	19,8	1,4			
Target	28,1	28,1	0			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

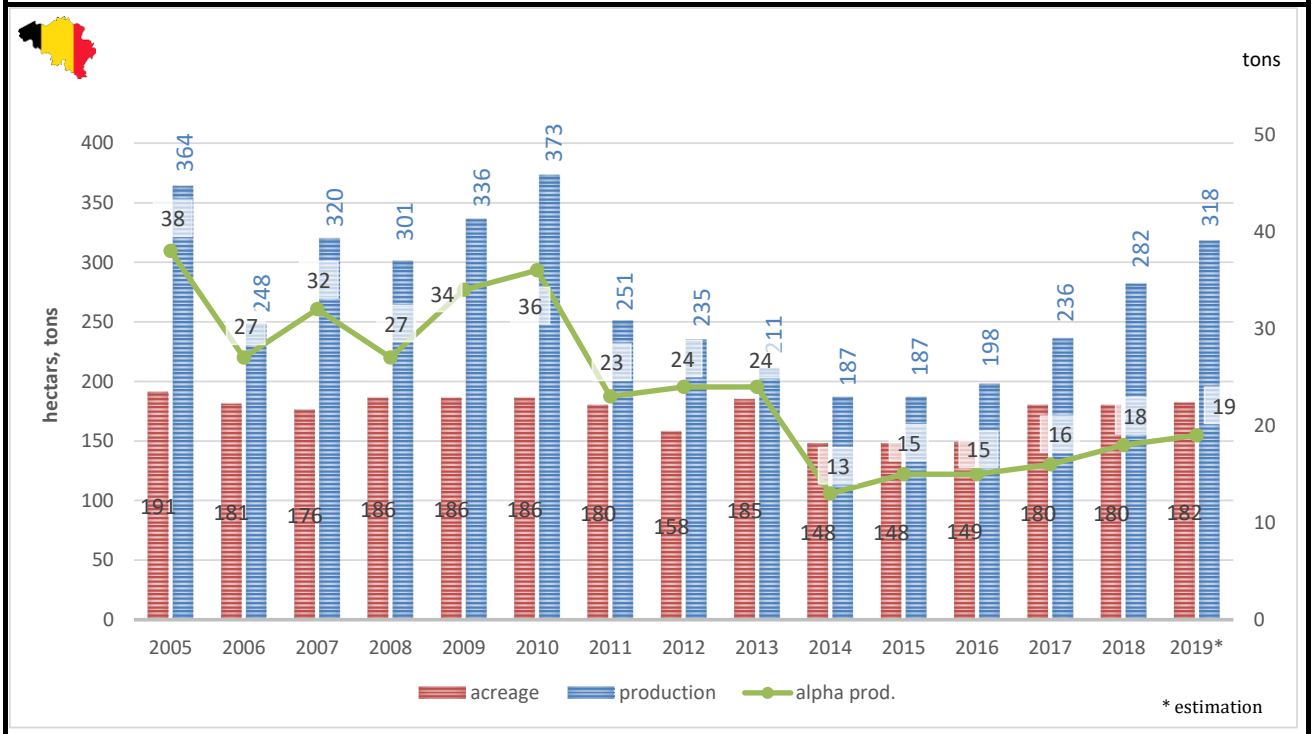
Country: **Belgium**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2018	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	12,3	15,1
O-Production (MT)	17,0	20,0

Main O-varieties

Golding Pilgrim
WGV Challenger

Country, Date:
Belgium **19.07.2019**

Member Organization(s): **VZW Hop**
Joris Cambie

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Czech Republic

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	4 679	4 714	35	0,7
Alpha	45	49	4	8,9
Total	4 724	4 763	39	0,8

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma	289	222
Alpha	7	19
Total	296	241

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	4 968	4 936	-32	-0,6
Alpha	52	68	16	30,8
Total	5 020	5 004	-16	-0,3

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	5 025	6 180	1 155	23,0
Alpha	101	120	19	18,8
Total	5 126	6 300	1 174	22,9

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,01	1,25	23,8
Alpha	1,94	1,76	-9,1
Total	1,02	1,26	23,3

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma	175,0		268,0		93,0	53,1
Alpha	10,0		12,0		2,0	20,0
Total	185,0		280,0		95,0	51,4

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						
SAAZ	4349	4264	-85	2,9		
Sládek	320	344	24	4,3		
Premiant	170	193	23	5,1		
Saaz Late	46	46	0	1,5		
Kazbek	34	33	-1	4,8		
Saaz Special	34	41	7			
Alpha						
Agnus	42	58	16			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

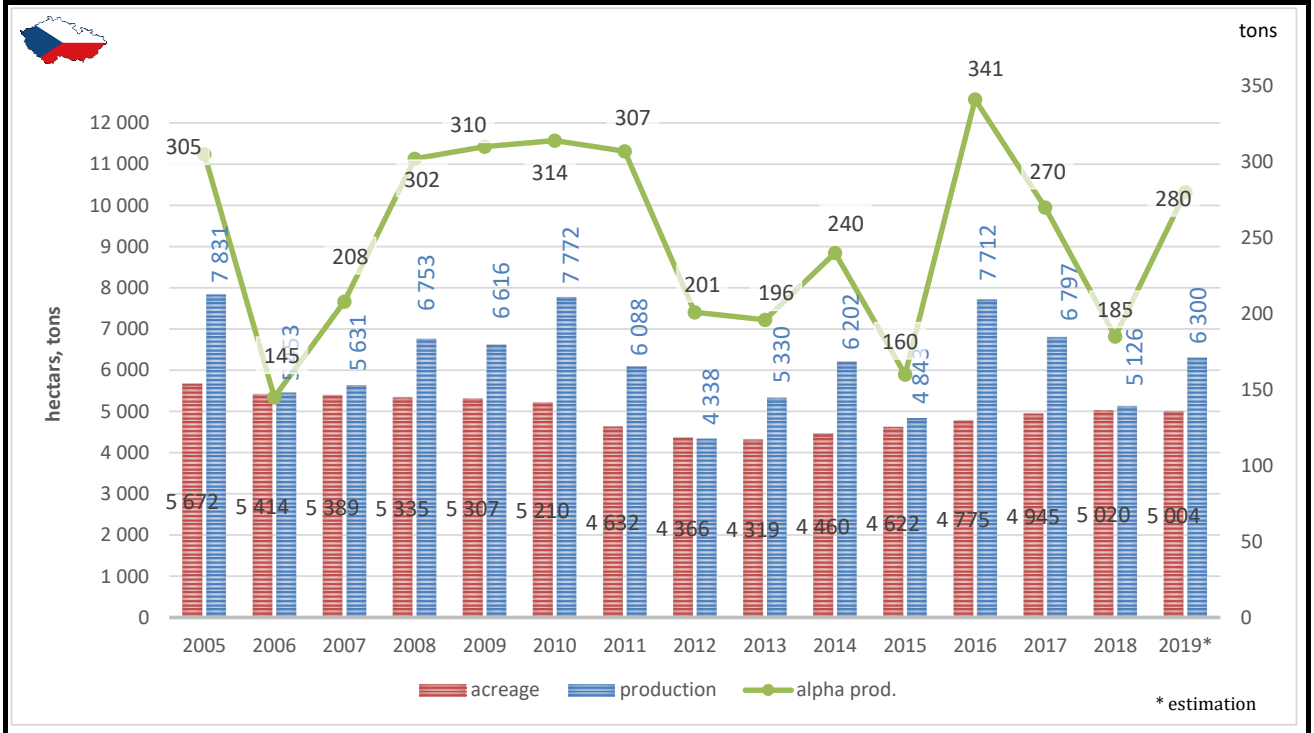
Country:
Czech Republic

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N	100	100	97	80	75	60

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops	7,3	7,8			farmer price
Alpha Hops	5,0	5,2			farmer price
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	10,55	10,55
O-Production (MT)	6,90	10,00

Main O-varieties
Saaz
Premiant

Country, Date:
20.07.2019

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

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

France

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	424	440	16	3,7
Alpha	39	26	-13	-33,5
Total	463	466	3	0,6

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma	29	35
Alpha	4	6
Total	33	41

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	454	475	21	4,6
Alpha	42	32	-11	-25,2
Total	496	506	10	2,1

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	775	807	32	4,1
Alpha	89	70	-19	-21,3
Total	864	877	13	1,5

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,71	1,70	-0,5
Alpha	2,10	2,21	5,1
Total	1,74	1,73	-0,6

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma	17,2	3,2	29,5	4,0	12,3	71,5
Alpha	7,8	7,4	6,5	8,0	-1,3	-16,7
Total	25,0		36,0		11,0	44,0

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						
Strisselspalt	175,5	171,5	-4			
Aramis	58,1	70,2	12,1			
Tradition	22,2	10,7	-11,5			
Triskel	47,9	45,5	-2,4			
Fuggle	54,9	54,8	-0,1			
Golding	46,8	48,2	1,4			
Challenger	6	6	0			
Barbe-Rouge	12	12,7	0,7			
Mistral	8,9	12	3,1			
Cascade	2,7	4,3	1,6			
Elixir		10,5	10,5			
Brewers Gold	15,7	15,9	0,2			
Alpha						
Columbus	5,4	5,4	0			
Nugget	9,2	12,8	3,6			
Magnum	5,8	5,8	0			
Target	5,65	6,7	1,05			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

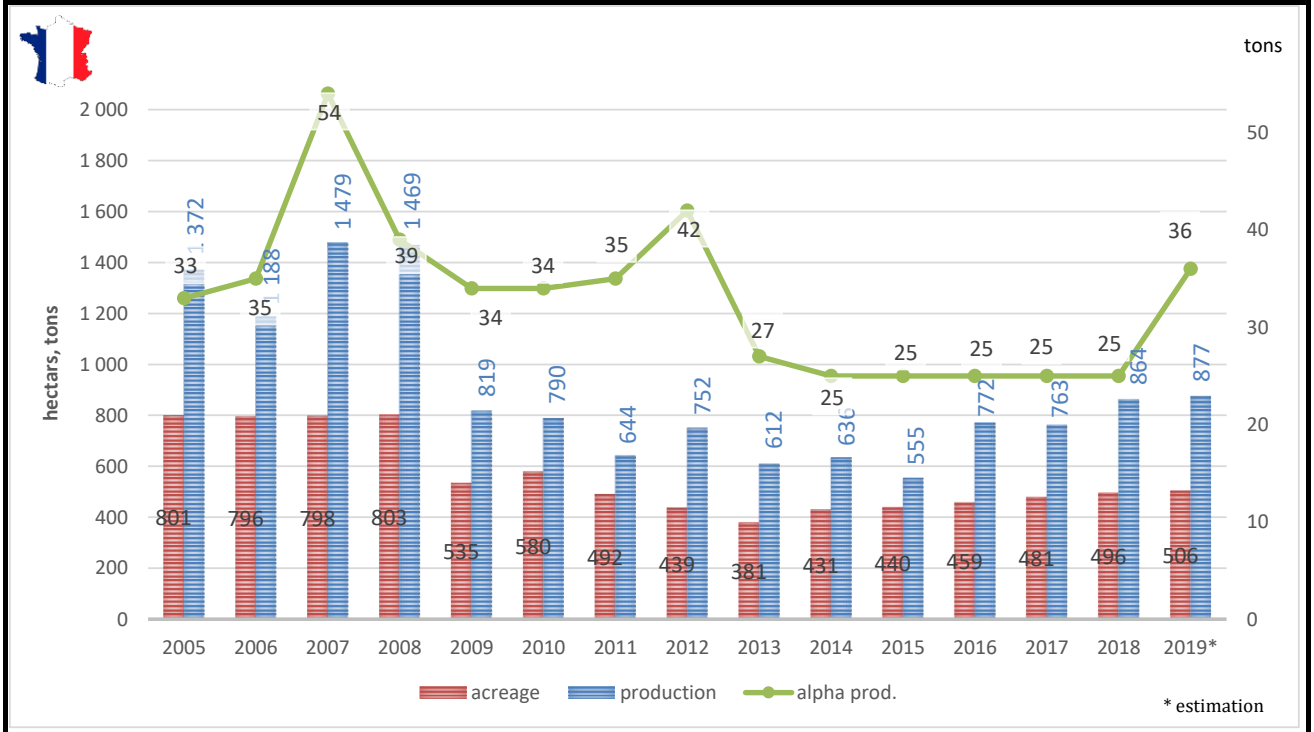
Country: **France**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N	95	90	85	70	60	60

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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		6,50-8,00 €/kg	6,00-8,00 €/kg		

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	19,2	19,2
O-Production (MT)	28,1	28,0

Main O-varieties

Country, Date:

Member Organization(s):
Francis Heitz

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Germany

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	10 822	10 860	38	0,4
Alpha	8 465	8 913	448	5,3
Total	19 287	19 773	486	2,5

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma	346	362
Alpha	511	282
Total	857	644

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	11 168	11 222	54	0,5
Alpha	8 976	9 195	219	2,4
Total	20 144	20 417	273	1,4

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	20 054	20 900	846	4,2
Alpha	21 740	22 800	1 060	4,9
Total	41 794	43 700	1 906	4,6

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,8	1,9	3,7
Alpha	2,4	2,5	2,4
Total	2,1	2,1	3,2

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma	960	4,8	1 200	5,7	240	1,0
Alpha	3 040	14,0	3 800	16,7	760	2,7
Total	4 000	9,6	5 000	11,4	1 000	1,9

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	3 003	3 148	145	5,5	7,3	1,8
Hall.Tradition	2 712	2 770	58	5	6	1
Hersbrucker	924	918	-6	2	2,8	0,8
Hallertauer	687	678	-9	3,6	3,9	0,3
Tettnanger	750	732	-18	3	3,7	0,7
Spalter Select	578	611	33	3,5	4,7	1,2
Saphir	515	492	-23	3,3	3,8	0,5
Mand. Bavaria	321	298	-23	7,5	7,6	0,1
North. Brewer	293	279	-14	7,4	8,8	1,4
Amarillo	300	206	-94			
Spalter	120	118	-2	3,5	3,6	0,1
Alpha						
Herkules	6 309	6 554	245	14,6	16,4	1,8
Hall. Magnum	1 992	1 954	-38	11,6	13,4	1,8
Hall.Taurus	258	228	-30	13,6	16,1	2,5
Nugget	128	123	-5	10,1	11,2	1,1
Polaris	225	275	50	18,4	19,3	0,9

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

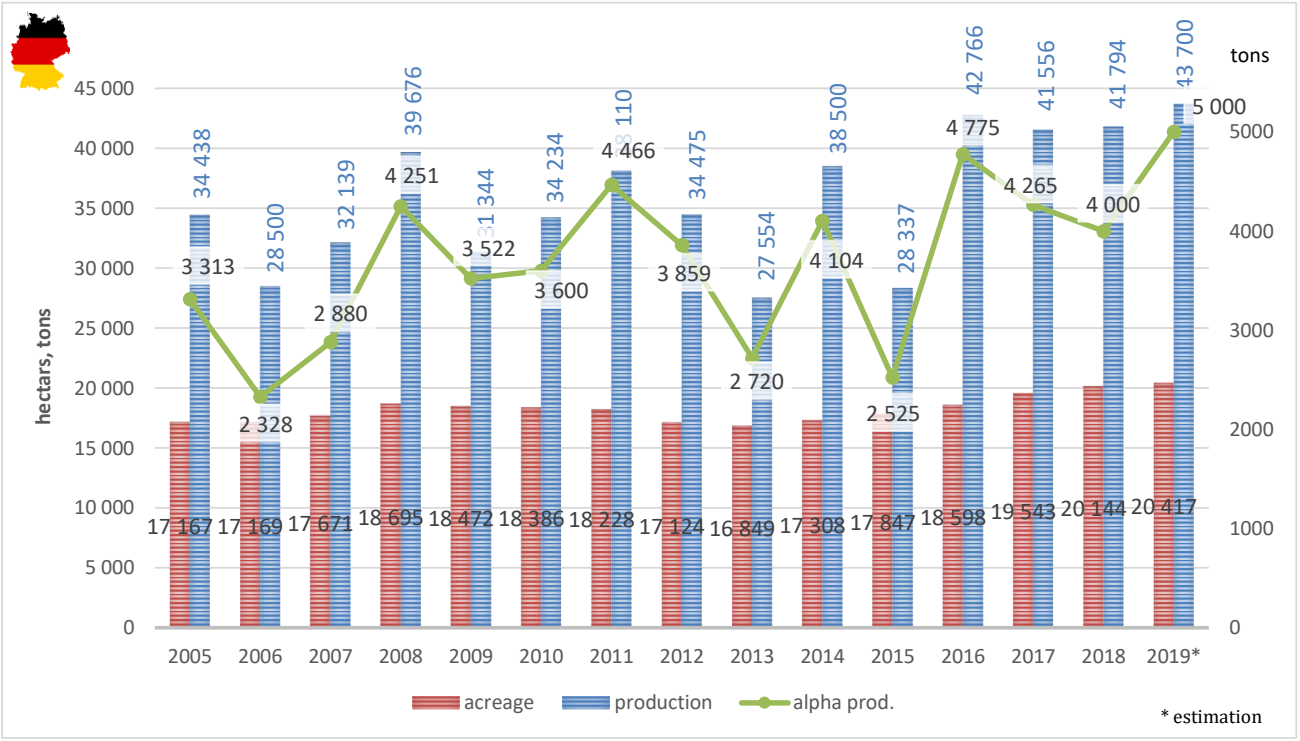
Germany

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons	42 871	42 944	37 774	35 714	29 937	23 897
% Crop / Year N	98	98	86	82	69	55

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	9,16	7,86		-14,20	Farmer Price
Alpha Hops	10,35	7,59		-26,70	Farmer Price
Average Price	9,74	7,77		-20,20	Farmer Price
Contract Prices					
Aroma Hops	5,51	6,02		9,30	Farmer Price
Alpha Hops	4,36	4,84		11,00	Farmer Price
Average Price	4,9	5,37		9,60	Farmer Price
Average Prices					
Aroma Hops	5,9	6,23		5,60	Farmer Price
Alpha Hops	5	4,97		-0,60	Farmer Price
AVERAGE	5,4	5,58		3,30	Farmer Price

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	121	140
O-Production (MT)	160	190

Main O-varieties
HAT/PER/SSE

Country, Date:
Germany 25.07.2019

Member Organization(s):
gez. Brunner

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

New Zealand

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	360	598	238	66,1
Alpha	52	145	93	178,8
Total	412	743	331	80,3

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma		238
Alpha		93
Total		331

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	360	598		
Alpha	52	145		
Total	412	743		

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	679	780	101	14,9
Alpha	115	239	124	107,8
Total	794	1 019	225	28,3

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,89	1,30	-30,8
Alpha	2,21	1,65	-25,5
Total	1,93	1,37	-28,8

Alpha Prod.	Year N-1	2018	Year N	2019	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						
Nelson Sauvin	104	187	83			
Motueka	79	176	97			
Wakatu	36	38	2			
Organic Hops	13	13	0			
Alpha						
Moutere	10	33	23			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

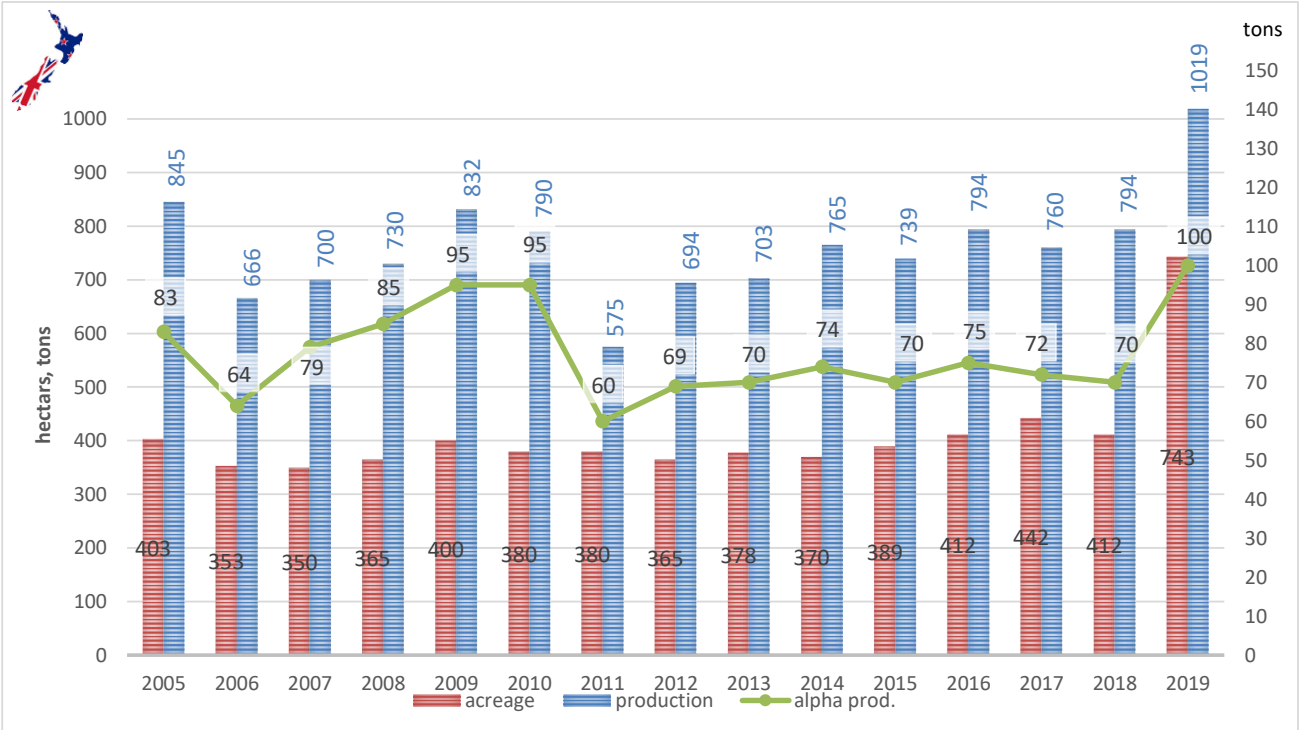
New Zealand

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

A significant increase in both acrage and volume was seen in in 2019 through expansion of existing farms and also an increase in new growing operations was seen in the NZHL cooperative. Yeilds were reduced through very dry conditions for extended periods in summer and also due to the large of areas of new ground with baby plants. The increase in alpha acerage and volume is attributable to a change in reporting classifaction where previously some varieties had been reported as aroma / flavour hops. Nelson Sauvin remains being reported as an aroma hop. Organic production was at circa 20 MT and some smaller volumes of trial hops were also produced. Growth continues in the New Zealand Hop Industry with two new growing operations established outside of the NZHL cooperative and we hope to report on these increaeses in acerage and volume from the 2020 harvest numbers. Market conditions remain favaourable for New Zealand Hops.

	Year N-1	Year N 2019
O-Hop Area (Ha)	13	13
O-Production (MT)		

Main O-varieties

Country, Date:
16.07.2019

Member Organization(s):
New Zealand, Doug Donelan

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Poland

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	635	646	11	1,8
Alpha	946	1 016	69	7,3
Total	1 581	1 662	81	5,1

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma	11	10
Alpha	69	10
Total	81	20

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	646	656	10	1,5
Alpha	1 016	1 026	10	1,0
Total	1 662	1 682	20	1,2

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	1 125	1 000	-125	-11,1
Alpha	2 083	1 900	-183	-8,8
Total	3 208	2 900	-308	-9,6

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,74	1,52	-12,5
Alpha	2,05	1,85	-9,7
Total	1,93	1,72	-10,7

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma	41	3,6	35	3,5	-5,5	-13,6
Alpha	239	11,5	209	11,0	-30,1	-12,6
Total	280	-	244	-	-35,6	-12,7

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						
Marynka	310,49	315,49	5	7,1		
Lubelski	404,47	409,47	5	2,1		
Lomik	2,66	2,66	0			
Perle	44,05	44,05	0	4,6		
Sybilla	109,53	109,53	0	3,0		
H. Tradition	61,33	61,33	0	3,5		
Puławski	6,52	6,52	0			
Triskel	1,42	1,42	0	2,95		
Saaz	2,45	2,45	0	2,65		
Cascade	11,38	11,38	0			
Centennial	0,7	0,7	0			
Crystal	0,1	0,1	0			
Tomyski	0,9	0,9	0			
Willamette	0,4	0,4	0			
Alpha						
Magnum	556,7	561,7	5	10,7		
Magnat	125,91	130,91	5	11,9		
Izabella	0,4	0,4	0			
Iunga	11,96	11,96	0			
Chinook	2,2	2,2	0			
Zula	1,2	1,2	0			
New varieties plants	1	1	0			
Taurus	3,68	3,68	0			
Oktawia	2,22	2,22	0			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

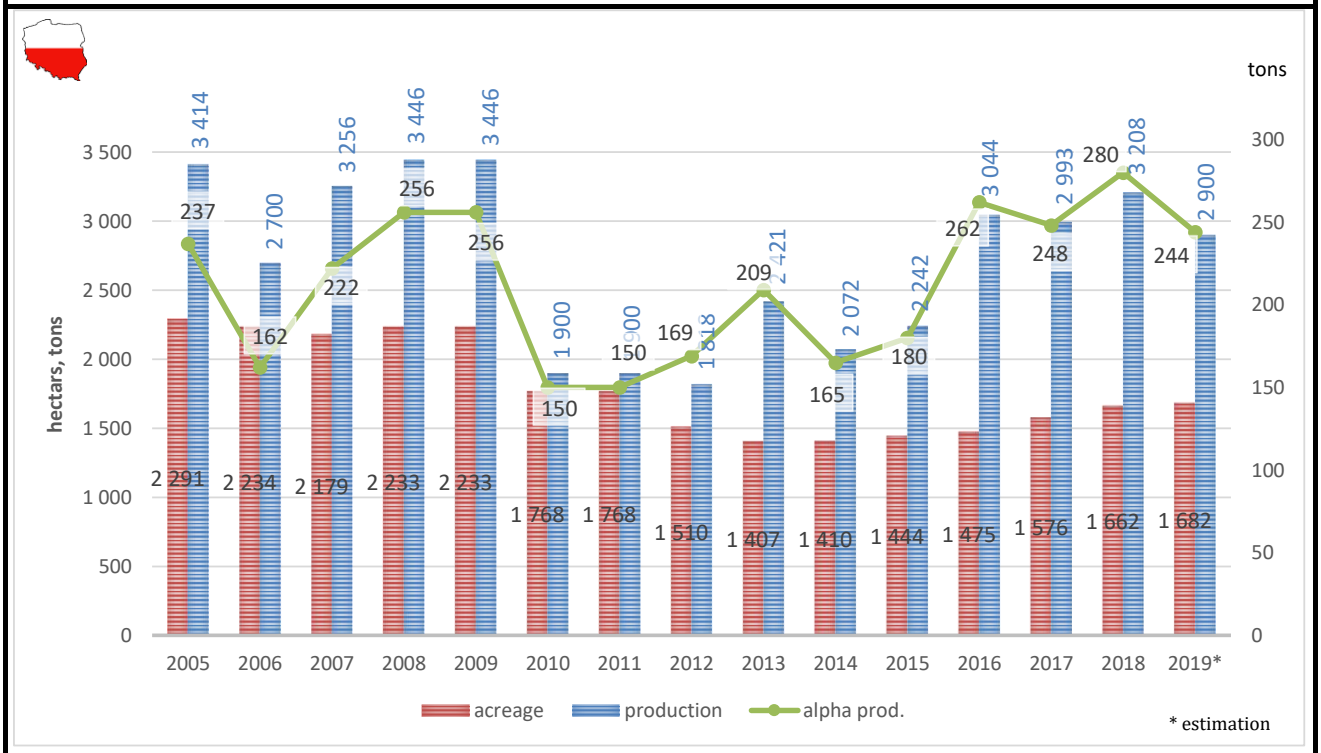
Poland

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons	2 000	2 000	2 000	1 000	1 000	1 000
% Crop / Year N	67	67	67	33	33	33

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	4,48	4,65	-	-	Farmers Price
Alpha Hops	5,95	5,81	-	-	Farmers Price
Average Price	5,22	5,23	-	-	Farmers Price
Contract Prices					
Aroma Hops	4,93	4,65	4,65	0	Farmers Price
Alpha Hops	4,8	4,19	4,19	0	Farmers Price
Average Price	4,89	4,42	4,42	0	Farmers Price
Average Prices					
Aroma Hops	4,71	4,65	-	-	Farmers Price
Alpha Hops	5,4	5	-	-	Farmers Price
AVERAGE	5,06	4,83	-	-	Farmers Price

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	8,2	9,5
O-Production (MT)	9	11

Main O-varieties

HMG	MAR	PUL
MGN	CAS	

Country, Date: Poland, 10.07.2019

Member Organization(s):
Polish Hop Growers Association

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Romania

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	73	75	2	2,7
Alpha	197	202	5	2,5
Total	270	277	7	2,6

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma	2	0
Alpha	5	3
Total	7	3

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	75	75	0	0,0
Alpha	202	205	3	1,5
Total	277	280	3	1,1

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	85	90	5	5,9
Alpha	130	165	35	26,9
Total	215	255	40	18,6

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,13	1,20	5,9
Alpha	0,64	0,80	25,1
Total	0,78	0,91	17,3

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma	6,5	7,6	7,2	8,0	0,7	10,8
Alpha	12,5	9,6	22,2	12,0	9,7	77,6
Total	19,0	8,8	29,4	10,7	10,4	54,7

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						
Perle	43	43	0			
Huller Bitterer	30	28	-2			
Tradition	2	2	0			
Cascade	0	2	2			
Alpha						
Magnum	108	111	3			
Merkur	24	24	0			
Brewers Gold	70	70	0			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

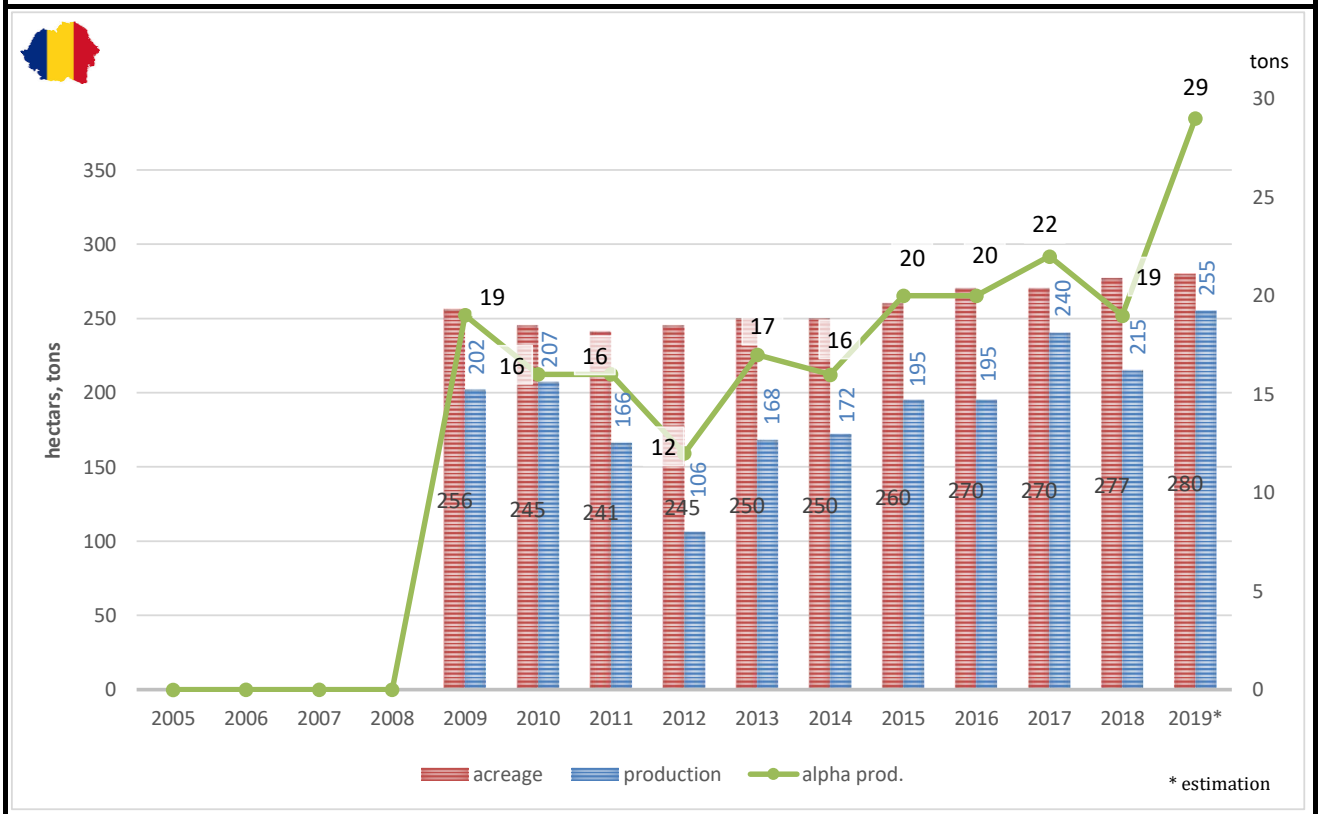
Romania

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons	255	280	300	320	330	340
% Crop / Year N	100	100	100	100	100	100

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

In the 2019 June 24 we had a hailstrom damage 41 ha area. The production are desceased with 30 -40 %.

	Year N-1	Year N 2019
O-Hop Area (Ha)	0	0
O-Production (MT)	0,00	0,00

Main O-varieties

Country, Date:
15 july 2019

Member Organization(s):
MORA ACATIU ERVIN

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Russia

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	162	168	6	3,7
Alpha	66	74	8	12,1
Total	228	242	14	6,1

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma	16	8
Alpha	8	4
Total	24	12

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	178	176	-2	-1,1
Alpha	74	78	4	5,4
Total	252	254	2	0,8

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	192	200	8	4,2
Alpha	138	150	12	8,7
Total	330	350	20	6,1

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,08	1,14	5,4
Alpha	1,86	1,92	3,1
Total	1,31	1,38	5,2

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma	6,7	3,5	8,0	4,0	1,3	19,0
Alpha	11,0	8,0	12,0	8,0	1,0	8,7
Total	17,8		20,0		2,2	12,6

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						
Ранний	162	168	6			
Alpha						
Подвязный	42	40	-2			
Фаворит	24	34	10			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

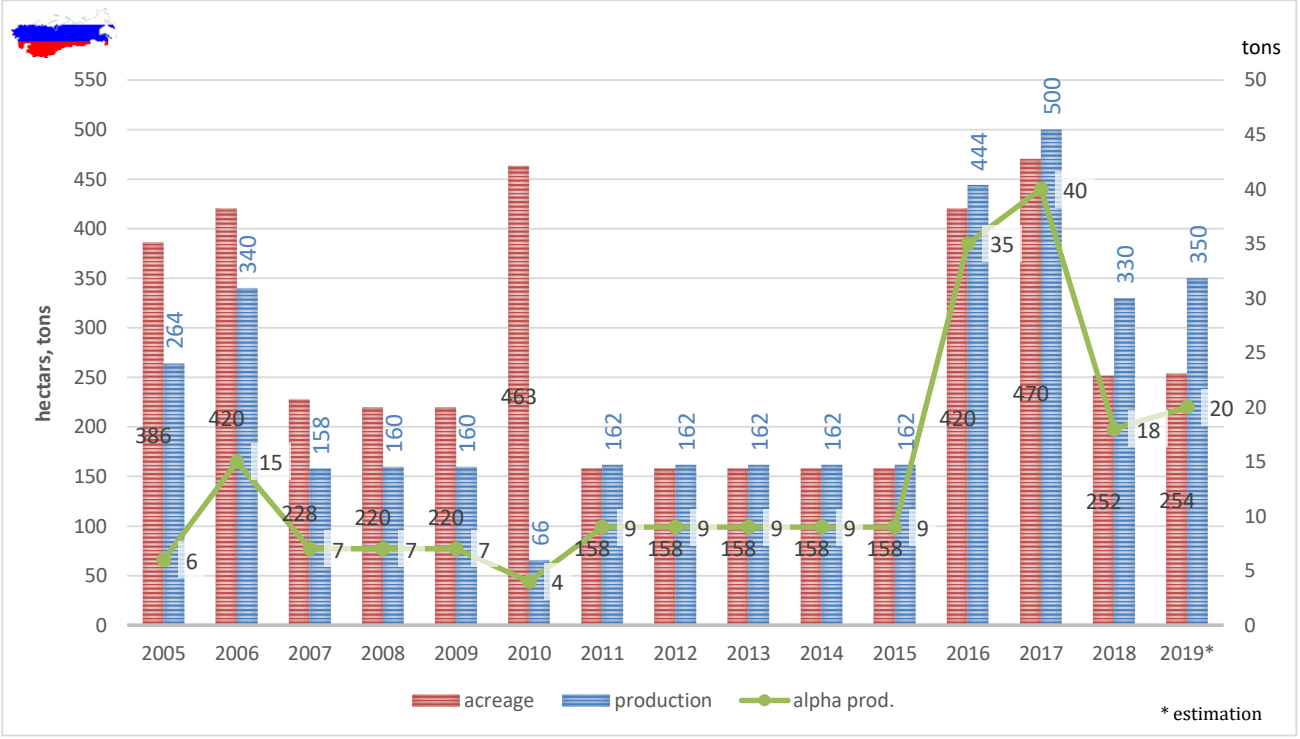
Russia

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons	60					
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:

22.07.2019

Member Organization(s):

Tatiana Grigoryeva

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Serbia

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	8	8	0	0,0

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	8	8	0	0,0

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	16	16	0	0,0

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma			
Alpha			
Total	2,00	2,00	0,0

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma						
Alpha						
Total	1,5		1,5		0,0	0,0

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)
Bačka						
Aroma - new variety						
Robusta						
Neoplanta						
Vojvodina						
Dunaj						
Experimental						
Chinook						
Cascade						
CTZ						
Centenial						
ostatní						

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

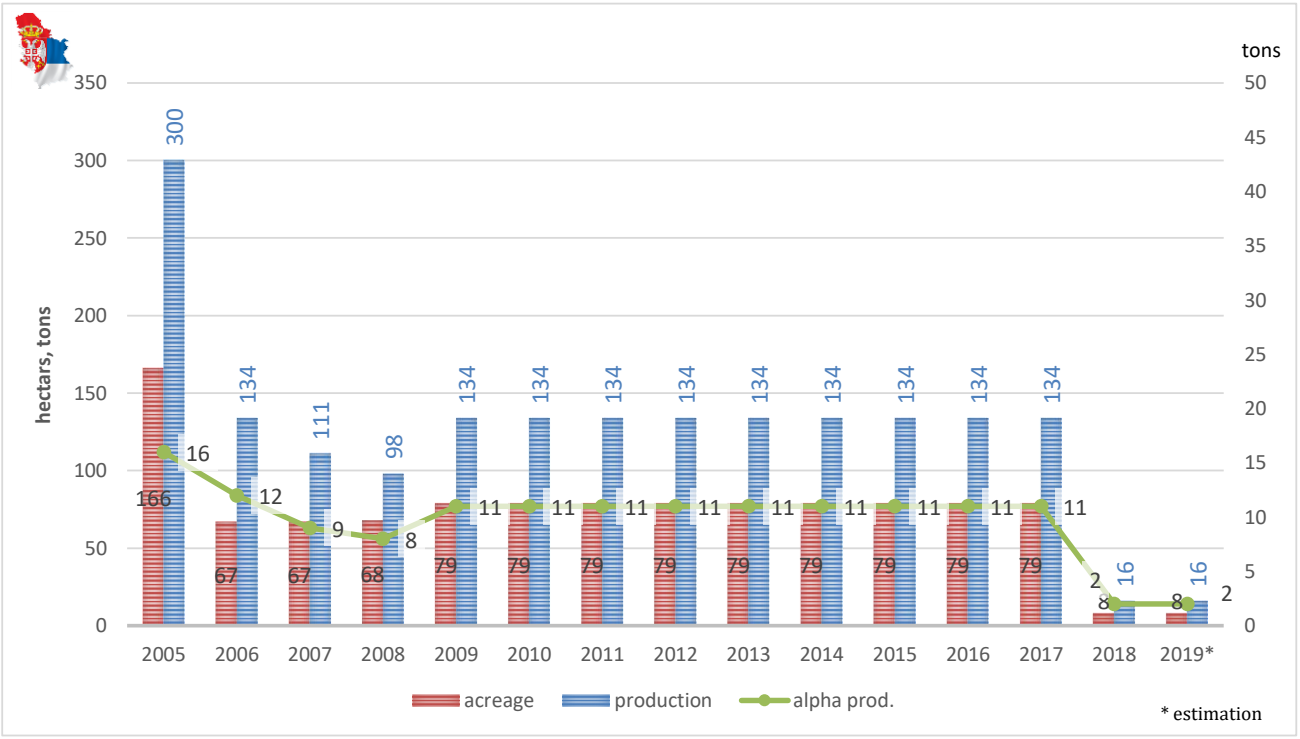
Serbia

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Hop gardens are in property of AS Petrovec (existing trellises - 20 hectars). There are 8 hectars strung for 2019 harvest. New 6 hectars of hops will be put in a ground in fall 2019. Most of all hops are Serbian varieties breeded in Hop Institute in Petrovec. Traditional variety is Bačka and Aroma is a new aroma variety. Other varieties breeded in the Institute are Robusta, Neoplanta, Vojvodina and Dunaj. There are several experimental hop plants of Chinook, Cascade, CTZ and Centennial. Bačsky hops have a rich tradition dates 250 years back when prof. Andrej Hadik started to grow the first hops. Serbia would like to return on world hop map as well as among IHGC hop countries.

	Year N-1	Year N 2019
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:
25.07.2019

Member Organization(s):
prof. Ján Kišgeci

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Slovakia

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	137	129	-8	-5,8
Alpha				
Total	137	129	-8	-5,8

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma		4
Alpha		
Total		4

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	137	133	-4	-2,9
Alpha				
Total	137	133	-4	-2,9

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	127	105	-22	-17,3
Alpha				
Total	127	105	-22	-17,3

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	0,93	0,79	-14,8
Alpha			
Total	0,93	0,79	-14,8

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma	5,0		4,0		-1,0	-20,0
Alpha						
Total	5,0		4,0		-1,0	-20,0

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	114	110	-4			
Permiant	23	23	0			
Alpha						

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

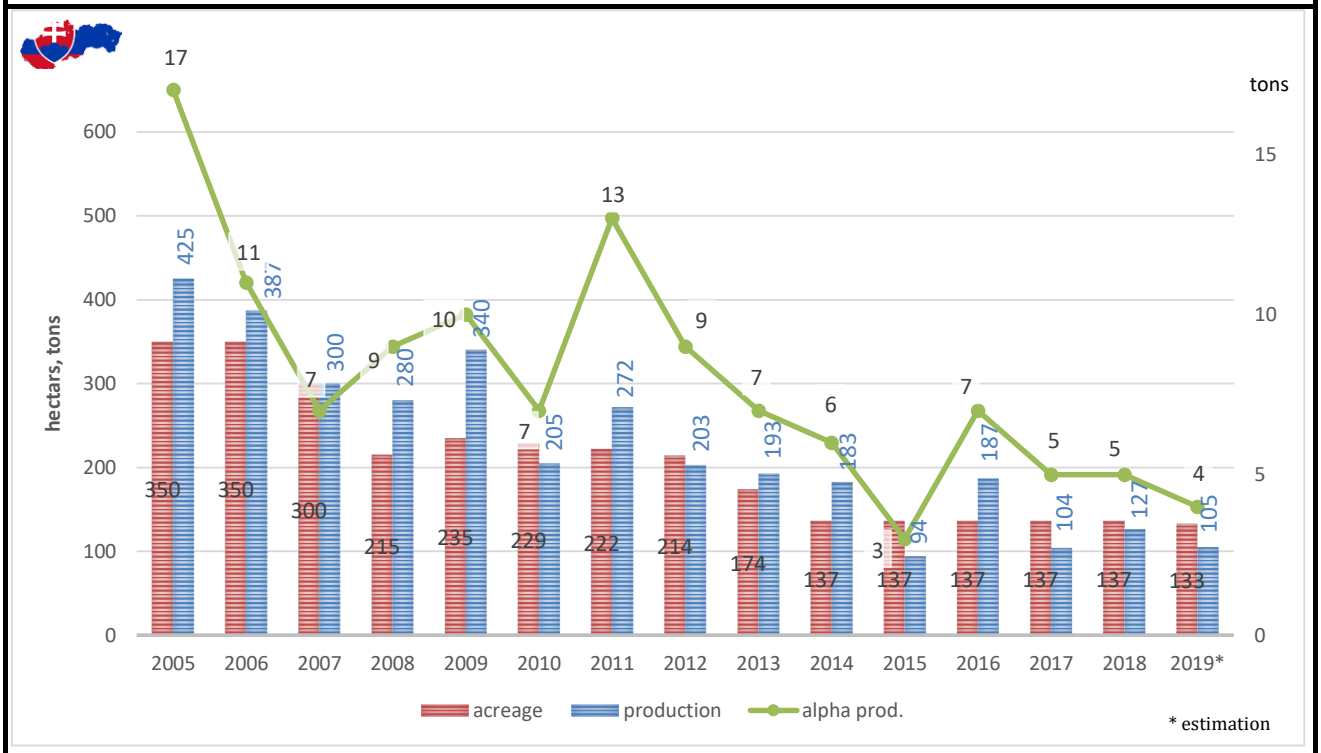
Slovakia

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N	100	100	100			

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices					
Aroma Hops	7				
Alpha Hops					
AVERAGE					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:

22.07.2019

Member Organization(s):

Slovchmel' družstvo

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Slovenia

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	1 526	1 500	-26	-1,7
Alpha	21	21	0	0,0
Total	1 547	1 521	-26	-1,7

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma	120	75
Alpha	0	0
Total	120	75

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	1 646	1 575	-71	-4,3
Alpha	21	21	0	0,0
Total	1 667	1 596	-71	-4,3

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	3 078	2 500	-578	-18,8

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma			
Alpha			
Total	1,85	1,57	-15,2

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents %	Metric Tons *(estimate)*	Av. Contents %	Metric Tons	Av. Contents %
Aroma						
Alpha						
Total	160,0	5,2	130,0	5,2	-30,0	-18,8

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						
Aurora	551	564	13			
Savinjski golding	178	172	-6			
Styrian golding=Celeia	584	536	-48			
Bobek	169	157	-12			
Styrian Gold	49	40	-9			
Styrian Wolf	37	42	5			
Styrian Cardinal	17	16	-1			
Styrian Kolibri	5	5	0			
Alpha						
Hall. Magnum	15	15	0			
Extra Styrian Dana	6	6	0			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

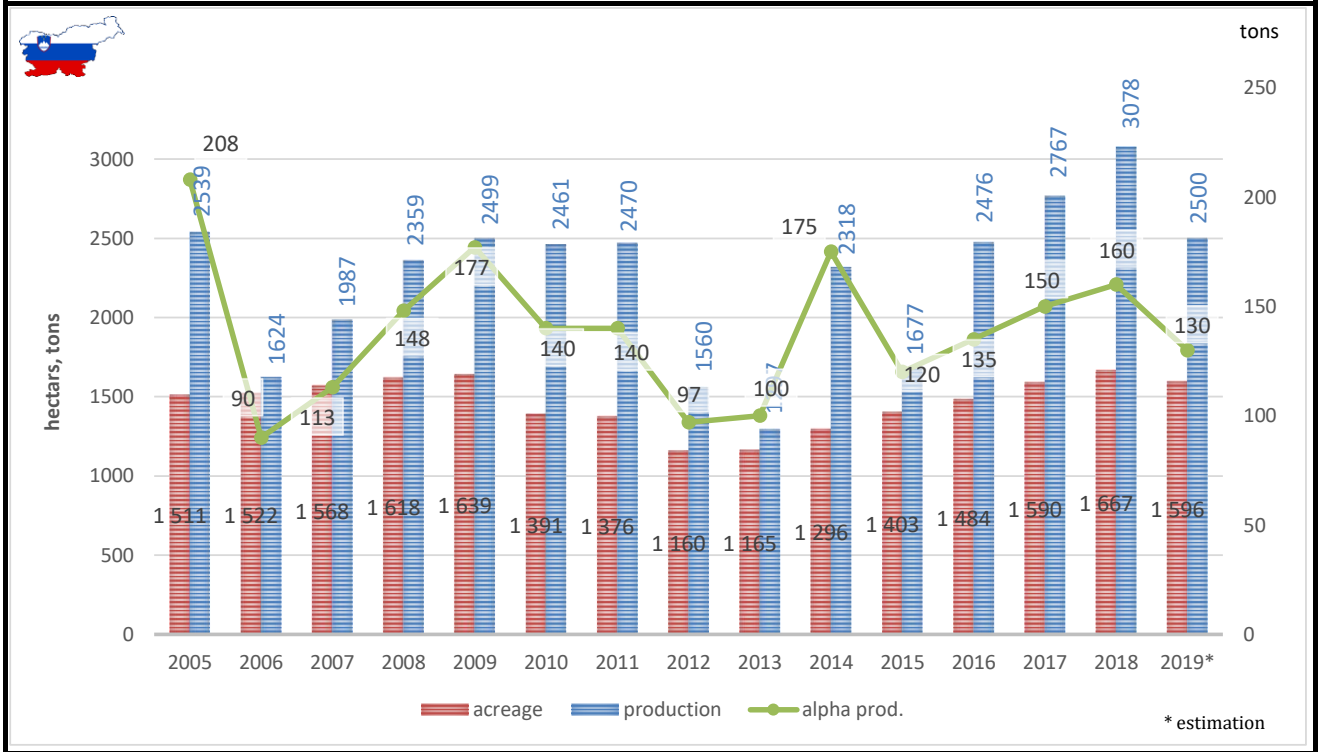
Slovenia

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N	90	85	80	75	70	N.A.

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops	0	0	0	0
% unsold Hops	0	0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Average Prices	**6,6**	**7**			
Aroma Hops					
Alpha Hops					
AVERAGE					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Overall the crop currently looks average. We have had low temperatures in May, high in June, appropriate in July. So far we have a sufficient amount of precipitation. At the end of June and July, we were hit by hailstorms which caused damage in some hop fields.

	Year N-1	Year N 2019
O-Hop Area (Ha)	1	1
O-Production (MT)		

Main O-varieties

Styrian Gold

Country, Date:
Slovenia, July 19, 2019

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

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

Spain

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	0	0	0	
Alpha	536	532	-4	-0,7
Total	536	532	-4	-0,7

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma				
Alpha	536	532	-4	-0,7
Total	536	532	-4	-0,7

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma				
Alpha	900	900	0	
Total	900	900	0	

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma			
Alpha	1,67	1,67	
Total	1,67	1,67	

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	*(estimate)*	%		%
Aroma						
Alpha	109,0		109,0			
Total	109,0		109,0			

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						
Alpha						

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

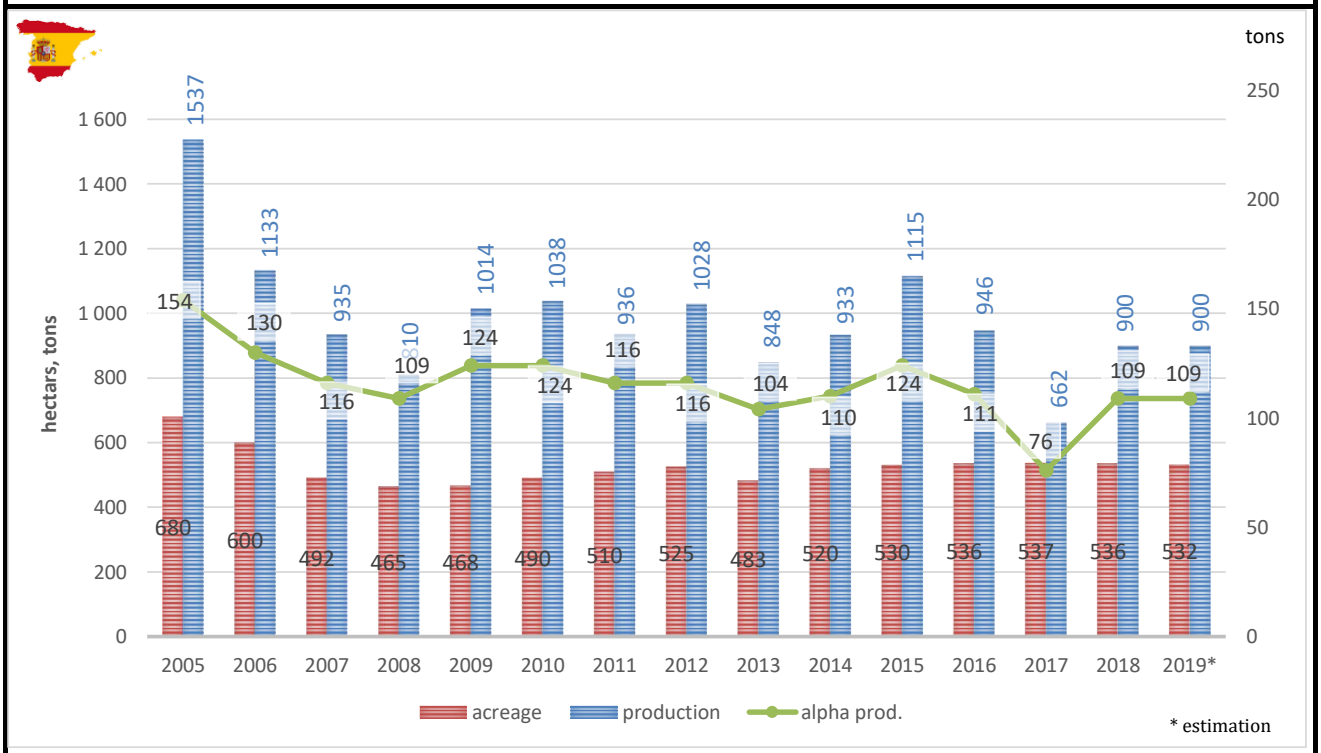
Spain

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)		
O-Production (MT)		

Main O-varieties

Country, Date:
26.07.2019

Member Organization(s):
LÚPULOS DE LEÓN SAT

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

UK

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	948	953	5	0,5
Alpha				
Total				

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	948	953	5	0,5
Alpha				
Total				

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	1 377	1 430	53	3,8
Alpha				
Total				

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,45	1,50	3,3
Alpha			
Total			

Alpha Prod.	Year N-1	2018	Year N	2019	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						
Alpha						

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country: **UK**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N	80	80	80	40	20	

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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					

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2019
O-Hop Area (Ha)	4,2	5,8
O-Production (MT)	3,60	3,60

Main O-varieties

Country, Date:
22.07.2019

Member Organization(s):
English Hops Limited

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

Country:

USA

Hop Area (Ha = Hectares)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	17 423	18 489	1066	6,1%
Alpha	5 956	5 674	-282	-4,7%
Total	23 379	24 163	784	3,4%

2019 total acreage: 23,204 ha in Pacific Northwest + 960 ha outside of Pacific Northwest

New Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	17 423	18 489	1066	6,1%
Alpha	5 956	5 674	-282	-4,7%
Total	23 379	24 163	784	3,4%

Production MT=Metric Tons	Year N-1 2018	Year N 2019 *(estimate)*	Difference N - (N-1)	Difference %
Aroma	33 272	33 280	8	0,02%
Alpha	15 901	15 750	-151	-0,95%
Total	49 173	49 030	-143	-0,29%

Yield MT/Ha	Year N-1 2018	Year N 2019 *(estimate)*	Difference %
Aroma	1,91	1,80	-5,74%
Alpha	2,67	2,60	0,00%
Total	2,10	2,03	-3,53%

Alpha Prod.	Year N-1	2018	Year N	2019	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents EBC %	Metric Tons *(estimate)*	Av. Contents %	Metric Tons	Av. Contents %
Aroma	3 161	9,5%				
Alpha	2 433	15,3%				
Total	5 594	11,4%				

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha % EBC	Year N Alpha %	Difference N-(N-1)
Aroma						
Amarillo®, VGXP01	1 001	874	-127			
Azacca™, ADHA-483	221	238	17			
Cascade	2 488	2 137	-351			
Centennial	1 851	1 468	-383			
Chinook	1 143	958	-185			
Citra®, HBC 394	2 583	3 656	1073			
Cluster	272	188	-84			
Ekuanot™, HBC 366	350	255	-95			
El Dorado®	218	389	171			
Idaho 7™		157	157			
Mosaic®, HBC 369	986	1 710	724			
Sabro™, HBC 438		274	274			
Simcoe®, YCR 14	1 614	1 766	152			
Other PNW Aroma	3 810	3 550	-260			
Non-PNW Aroma	886	869	-17			
Total Aroma	17 423	18 489	1 066			
Alpha				15,30%		
Apollo™	415	238	-177			
Bravo™	149	96	-53			
CTZ	2 477	2 608	131			
Eureka!™	219	172	-47			
Galena	202	166	-36			
Hallertauer Magnum	42	31	-11			
Nugget	580	475	-105			
Pahto®, HBC 682	696	839	143			
Summit™	637	434	-203			
Super Galena™	270	223	-47			
Other PNW Alpha	171	296	125			
Non-PNW Alpha	98	96	-2			
Total Alpha	5 956	5 674	-282			

International Hop Growers' Convention

IHGC-Economic Committee: July 2019 - Žalec, Slovenia

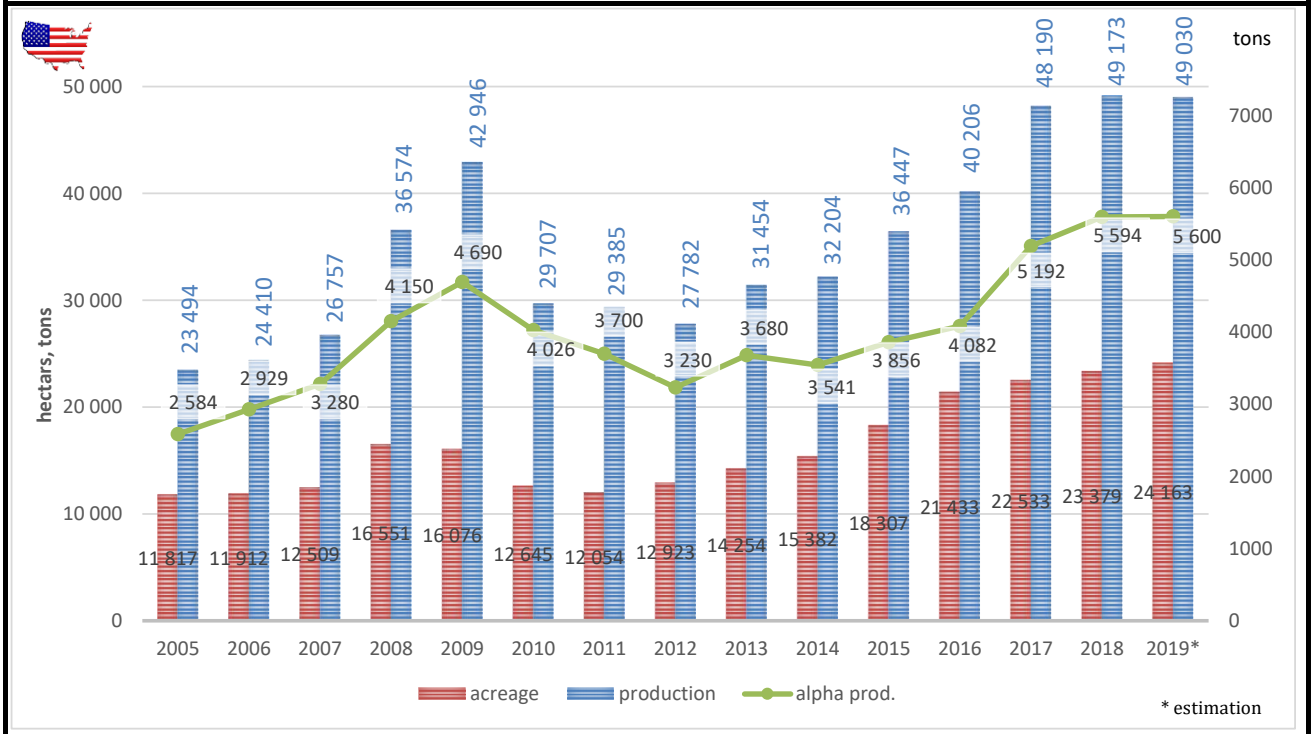
Country: **USA**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Metric tons						
% Crop / Year N	98%	90%	70%	50%	30%	

Unsold Hops (MT) : Crop Year (N-1)	**2018**	**Aroma**	**Alpha**	**Total**
= Total Hop Production		33 272	15 901	49 173
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2017	Year (N-1) 2018	Year (N) 2019	% Diff. N vs. (N-1)	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	10.98 Euro/kg	10.71 Euro/kg			
Average USD/lb.	$5,60	$5,46			

CHART OF HOP CROPS 2005- 2019*



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Exchange rate $1 USD = 0.89 Euro (17 April 2019). Alpha and aroma classifications are based on IHGC list of hop varieties. The USDA statistical reporting system in voluntary, and individual varieties are not reported if three or fewer growers produce the variety in each state. 2019 total acreage includes 3,013 ha of baby hops (932 ha of expansion and 2,081 ha of existing hop acreage converted to new varieties), many of which will not be harvested.

	Year N-1	Year N 2019	
O-Hop Area (Ha)	174	239	27% increase
O-Production (MT)	217		

Main O-varieties

A total of 11 Pacific Northwest hop growers reported Organic hops

Country, Date: USA IV.19

Member Organization(s):
Hop Growers of America