



2009

STATISTICAL REPORT

RELEASED JANUARY 2010

PRESENTED BY
HOP GROWERS OF AMERICA



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Conversions used while compiling
the data presented in this document:

1 hectare = 2.4711 acres
1 acre = 0.405 hectares
1 kilogram = 2.2046 pounds
1 pound = 0.45 kilograms
1 metric tonne = 2204.6 pounds
1 hectoliter = 21.997 gallons
1 zentner = 110.23 pounds

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U.S. HOP ACREAGE BY STATE AND VARIETY 2005 – 2009

STATE & VARIETY	ACRES HARVESTED					2008-09
	2005	2006	2007	2008	2009	% +/-
IDAHO						
Total Idaho	3,287	2,797	2,896	3,933	4,030	2.47%
OREGON						
Cascade	62	*	*	76	152	100.00%
Glacier	231	*	*	*	*	
Golding	105	117	115	135	*	
Millennium	295	258	294	343	344	0.29%
Mt. Hood	219	113	178	186	158	-15.05%
Nugget	1,363	1,500	1,675	2,135	1,773	-16.96%
Sterling	276	109	95	95	101	6.32%
Super Galena®			*	*	177	
Willamette	2,273	2,301	2,396	2,593	2,469	-4.78%
Other	339	638	517	807	934	15.74%
Total Oregon	5,163	5,036	5,270	6,370	6,108	-4.11%
WASHINGTON						
Ahtanum	131	40	42	*	*	
Apollo®	*	*	*	698	747	7.02%
Bravo®	*	*	*	222	335	50.90%
Cascade	1,168	1,116	1,303	2,073	2,019	-2.60%
Centennial	112	*	*	253	298	17.79%
Chelan	212	505	505	739	762	3.11%
Chinook	489	365	311	285	384	34.74%
Cluster	463	352	366	420	501	19.29%
Columbus/Tomahawk®	2,812	2,772	3,342	4,891	4,858	-0.67%
Galena	3,869	3,809	3,030	2,584	2,412	-6.66%
Glacier	48	17	21	56	70	25.00%
Golding	37	53	52	38	42	10.53%
Hallertauer	48	49	56	*	*	
Millennium	1,115	910	728	716	557	-22.21%
Mt. Hood	51	44	43	29	96	231.03%
Northern Brewer	*	*	*	*	92	
Nugget	1,062	1,100	1,093	1,086	1,028	-5.34%
Simcoe®	*	*	*	129	183	41.86%
Sterling	93	62	*	*	*	
Summit® ²	*	66	632	2,403	3,238	34.75%
Super Galena®	*	*	*	793	839	5.80%
Vanguard	*	*	64	*	*	
Willamette	4,102	4,554	4,462	4,664	2,719	-41.70%
YCR4 - Palisade®	54	54	91	307	351	14.33%
YCR5 - Warrior®	584	421	339	394	301	-23.60%
Zeus	3,736	3,982	4,737	6,779	6,544	-3.47%
Other* ²	908	1,261	1,528	1,036	1,212	16.99%
Total Washington	21,013	21,532	22,745	30,595	29,588	-3.29%
Total United States ³	29,463	29,365	30,911	40,898	39,726	-2.87%

SOURCE: USDA-NASS and ADHA. Prepared by HGA.

* Included in the category "Other" to avoid disclosure of individual operations.

² "Other", as published in the USDA-NASS December 2009 National Hop Report, reports 4,450 acres in WA, which includes the Summit variety. HGA has included an estimate for Summit which has been provided by the American Dwarf Hop Association, as a separately reported variety in this chart, deducting that acreage from the "Other" acreage reported by NASS for 2008 and 2009.

³ Acreage reported as strung for harvest was 40,125 acres. Strung acreage left unharvested in 2009 totaled 1,030 acres, with a net harvested acreage of 39,726.

U.S. HOP YIELDS BY STATE AND VARIETY 2005 – 2009

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2008-09
	2005	2006	2007	2008	2009	% +/-
IDAHO						
Total Idaho	1,640	1,613	1,417	1,841	1,943	5.54%
OREGON						
Cascade	1,365	*	*	1,068	1,741	63.01%
Glacier	1,330	*	*	*	*	
Golding	1,017	1,371	1,403	1,307	*	
Millennium	1,876	2,540	2,323	2,179	2,552	17.12%
Mt. Hood	1,414	1,544	1,640	1,552	1,671	7.67%
Nugget	2,046	2,164	2,231	1,758	2,548	44.94%
Sterling	1,451	1,766	1,665	1,667	1,684	1.02%
Super Galena®			*	*	2,563	
Willamette	1,385	1,459	1,577	1,539	1,561	1.43%
Other	1,048	1,508	1,416	995	1,601	60.90%
Total Oregon	1,560	1,757	1,811	1,569	1,948	24.16%
WASHINGTON						
Ahtanum	1,986	2,110	1,964	*	*	
Apollo®		*	*	2,229	2,941	31.94%
Bravo®		*	*	2,340	2,397	2.44%
Cascade	2,036	1,954	2,031	1,781	2,120	19.03%
Centennial	1,375	*	*	1,452	1,490	2.62%
Chelan	2,244	2,187	2,364	2,178	2,680	23.05%
Chinook	1,844	1,871	1,818	1,775	1,819	2.48%
Cluster	1,782	2,184	2,030	2,038	2,370	16.29%
Columbus/Tomahawk®	2,516	2,660	2,533	2,585	2,790	7.93%
Galena	1,737	1,820	1,776	1,826	1,852	1.42%
Glacier	1,063	1,441	1,619	1,795	2,093	16.60%
Golding	886	992	1,500	1,385	826	-40.36%
Hallertauer	967	812	763	*	*	
Millennium	1,908	2,324	2,350	2,440	2,465	1.02%
Mt. Hood	1,267	1,109	1,316	1,572	1,570	-0.13%
Northern Brewer	*	*	*	*	753	
Nugget	1,727	1,841	1,909	2,068	2,060	-0.39%
Simcoe®	*	*	*	1,758	2,137	21.56%
Sterling	*	1,419	*	*	*	
Summit®#	*	1,864	1,822	1,724	2,687	55.86%
Super Galena®	*	*	*	2,104	3,186	51.43%
Vanguard	*	*	1,470	*	*	
Willamette	1,333	1,222	1,318	1,351	1,455	7.70%
YCR4 - Palisade®	2,759	2,998	2,519	2,091	2,756	31.80%
YCR5 - Warrior®	1,830	2,159	1,903	1,846	2,110	14.30%
Zeus	2,255	2,962	2,839	2,618	3,387	29.37%
Other*	1,576	1,775	1,355	1,233	1,567	27.09%
Total Washington	1,878	2,058	2,049	2,072	2,533	22.25%
Total United States	1,796	1,964	1,949	1,971	2,383	20.90%

SOURCE: USDA-NASS and ADHA. Prepared by HGA.

* included in the category "Other" to avoid disclosure of individual operations.

"Other", as published in the USDA-NASS December 2009 National Hop Report, includes the Summit variety for Washington. HGA has included a yield estimate for Summit which has been provided by the American Dwarf Hop Association, as a separately reported variety in this chart, deducting that amount from the "Other" acreage reported by NASS for 2008 and 2009.

U.S. HOP PRODUCTION BY STATE AND VARIETY 2005 – 2009

STATE & VARIETY	HOP PRODUCTION (POUNDS)					2008-09
	2005	2006	2007	2008	2009	% +/-
IDAHO						
Total Idaho	5,390,900	4,510,400	4,104,900	7,239,800	7,829,100	8.14%
OREGON						
Cascade	84,600	*	*	81,200	264,600	225.86%
Glacier	307,200	*	*	*	*	
Golding	106,800	160,400	161,400	176,400	*	
Millennium	553,400	744,200	682,900	747,400	877,900	17.46%
Mt. Hood	309,600	248,600	292,000	288,600	264,000	-8.52%
Nugget	2,788,800	3,440,800	3,737,500	3,753,200	4,517,100	20.35%
Sterling	400,400	217,200	158,200	158,400	170,100	7.39%
Super Galena®			*	*	453,700	
Willamette	3,147,800	3,357,200	3,778,800	3,989,600	3,853,900	-3.40%
Other	355,400	680,100	732,000	802,800	1,495,400	86.27%
Total Oregon	8,054,000	8,848,500	9,542,800	9,997,600	11,896,700	19.00%
WASHINGTON						
Ahtanum	99,300	84,400	82,500	*	*	
Apollo®		*	*	1,555,800	2,196,900	41.21%
Bravo®		*	*	519,500	803,000	54.57%
Cascade	2,378,000	2,180,700	2,646,400	3,692,000	4,280,300	15.93%
Centennial	154,000	*	*	367,400	444,000	20.85%
Chelan	475,700	1,104,400	1,193,800	1,609,500	2,042,200	26.88%
Chinook	901,700	682,900	565,400	505,900	698,500	38.07%
Cluster	825,100	768,800	743,000	856,000	1,187,400	38.71%
Columbus/Tomahawk®	7,075,000	7,373,500	8,465,300	12,643,200	13,553,800	7.20%
Galena	6,720,500	6,932,400	5,381,300	4,718,400	4,467,000	-5.33%
Glacier	51,000	24,500	34,000	100,500	146,500	45.77%
Golding	32,800	52,600	78,000	52,600	34,700	-34.03%
Hallertauer	46,400	39,800	42,700	*	*	
Millennium	2,127,400	2,114,800	1,710,800	1,747,000	1,373,000	-21.41%
Mt. Hood	64,800	48,800	56,600	45,600	150,700	230.48%
Northern Brewer	*	*	*	*	69,300	
Nugget	1,834,100	2,025,100	2,086,500	2,245,800	2,117,700	-5.70%
Simcoe®		*	*	226,800	391,100	72.44%
Sterling	142,000	88,000	*	*	*	
Summit®#	*	123,000	1,151,500	4,143,000	8,700,568	110.01%
Super Galena®		*	*	1,668,500	2,673,100	60.21%
Vanguard	*	*	94,100	*	*	
Willamette	5,468,000	5,565,000	5,880,900	6,301,100	3,956,100	-37.22%
YCR4 - Palisade®	149,000	161,900	229,200	641,900	967,400	50.71%
YCR5 - Warrior®	1,068,700	908,900	645,100	727,300	635,100	-12.68%
Zeus	8,424,700	11,794,700	13,448,300	17,747,400	22,164,500	24.89%
Other*	1,431,400	2,238,700	2,070,000	1,277,500	1,899,232	48.67%
Total Washington	39,469,600	44,312,900	46,605,400	63,392,700	74,952,100	18.23%
Total USA	52,914,500	57,686,700	60,253,100	80,630,100	94,677,900	17.42%

SOURCE: USDA-NASS and ADHA. Prepared by HGA.

* included in the category "Other" to avoid disclosure of individual operations.

"Other", as published in the USDA-NASS December 2009 National Hop Report, includes the Summit variety in WA. HGA has included an estimate for Summit which has been provided by the American Dwarf Hop Association, as a separately reported variety in this chart, deducting that production from the "Other" pounds reported by NASS for 2008 and 2009.

U.S. HOP ACREAGE BY STATE 1999 – 2009 (IN ACRES)

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
2000	26,980	5,819	3,321	36,120
2001	26,339	6,103	3,469	35,911
2001	26,339	6,103	3,469	35,911
2002	20,333	5,577	3,399	29,309
2003	19,492	5,748	3,429	28,669
2004	19,382	5,107	3,253	27,742
2005	21,013	5,163	3,287	29,463
2006	21,532	5,036	2,797	29,365
2007	22,745	5,270	2,896	30,911
2008	30,595	6,370	3,933	40,898
2009	29,588	6,108	4,030	39,726

SOURCE: USDA-NASS. Prepared by HGA.

U.S. AVERAGE HOP YIELD 1999 – 2009

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL U.S.
1999	1,980	1,730	1,408	1,884
2000	1,937	1,785	1,484	1,871
2001	1,928	1,875	1,329	1,861
2002	2,133	1,692	1,624	1,990
2003	2,050	1,626	1,536	1,903
2004	2,137	1,686	1,588	1,990
2005	1,878	1,560	1,640	1,796
2006	2,058	1,757	1,613	1,964
2007	2,049	1,811	1,417	1,949
2008	2,072	1,569	1,841	1,971
2009	2,533	1,948	1,943	2,383

SOURCE: USDA-NASS. Prepared by HGA.

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

Marketing Year	SEASON AVERAGE PRICE				U.S.	Total Crop
	Washington	Oregon	Idaho	U.S.	Production	Value
	----- (\$ / pound) -----				(Lbs. x 1,000)	(x 1,000)
1994	\$1.77	\$1.96	\$1.79	\$1.81	74,560	\$134,701
1995	\$1.68	\$1.90	\$1.61	\$1.71	78,852	\$135,087
1996	\$1.63	\$1.81	\$1.49	\$1.65	74,970	\$123,530
1997	\$1.60	\$1.68	\$1.41	\$1.60	74,872	\$119,840
1998	\$1.64	\$1.98	\$1.55	\$1.69	59,548	\$100,728
1999	\$1.63	\$2.04	\$1.61	\$1.69	64,455	\$109,099
2000	\$1.82	\$2.19	\$1.78	\$1.87	67,576	\$126,217
2001	\$1.81	\$2.15	\$1.59	\$1.91	66,832	\$123,843
2002	\$1.92	\$2.07	\$1.58	\$1.91	58,336	\$111,546
2003	\$1.79	\$2.32	\$1.62	\$1.86	54,565	\$101,637
2004	\$1.83	\$2.31	\$1.60	\$1.88	55,203	\$103,969
2005	\$1.86	\$2.56	\$1.63	\$1.94	52,914	\$102,818
2006	\$1.98	\$2.60	\$1.61	\$2.05	57,672	\$118,008
2007	\$2.94	\$3.31	\$2.77	\$2.99	60,253	\$179,978
2008	\$4.08	\$3.75	\$4.00	\$4.03	80,630	\$325,092
2009	\$3.52	\$3.63	\$3.75	\$3.55	94,678	\$336,375

SOURCE: USDA-NASS. Prepared by HGA.

2009 HOP INSPECTION REPORT

TABLE 1. Total Number of Bales Inspected – Weighted Average of Leaf & Stem in Parenthesis

YEAR	WASHINGTON (%)	OREGON (%)	IDAHO (%)	TOTAL (%)
2005	195,759 (0.09)	40,256 (0.18)	25,601 (0.08)	261,616 (0.15)
2006	218,805 (0.09)	43,929 (0.16)	22,244 (0.14)	284,978 (0.11)
2007	232,630 (0.18)	48,196 (0.20)	20,523 (0.19)	301,349 (0.19)
2008	302,122 (0.34)	45,321 (0.22)	21,397 (0.03)	368,840 (0.31)
2009	356,581 (0.12)	53,178 (0.25)	27,328 (0.15)	437,087 (0.14)

TABLE 2. Number of Bales in Each Leaf & Stem Category – 2009

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL
WA	317,285	35,270	3,307	719	-	-	-	-	356,581
OR	43,790	7,465	682	517	724	-	-	-	53,178
ID	23,732	3296	300	-	-	-	-	-	27,328
Total	384,807	46,031	4,289	1,236	724	-	-	-	437,087
% of Total	88%	11%	1%	0%	0%	0%	0%	0%	100%

TABLE 3. Number of Bales in Each Seed Category – 2009

	0%	1%	2%	3%	4%	5%	6%	7+%	TOTAL
WA	205,836	81,535	36,533	17,156	7,879	5,090	1,209	1,343	356,581
OR	27,362	10,433	4,594	1,784	2,514	1,497	1,275	3,719	53,178
ID	25,554	1,369	405	-	-	-	-	-	27,328
Total	258,752	93,337	41,532	18,940	10,393	6,587	2,484	5,062	437,087
% of Total	59%	21%	10%	4%	2%	2%	1%	1%	100%

SOURCE: USDA-GIPSA (Federal Grain Inspection Service).

U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE 1999 – 2009

Year	WASHINGTON Leaf & Stem	OREGON Leaf & Stem	IDAHO Leaf & Stem	U.S. AVERAGE Leaf & Stem	% Seed Content
1999	0.06	0.21	0.05	0.08	1.15
2000	0.11	0.23	0.01	0.12	1.18
2001	0.08	0.14	0.04	0.09	1.06
2002	0.07	0.32	0.04	0.11	0.63
2003	0.06	0.12	0.05	0.11	0.50
2004	0.11	0.28	0.01	0.07	0.56
2005	0.08	0.18	0.01	0.10	0.80
2006	0.09	0.16	0.14	0.15	0.56
2007	0.18	0.20	0.23	0.19	0.83
2008	0.34	0.22	0.03	0.31	1.85
2009	0.12	0.25	0.15	0.14	0.82

SOURCE: USDA-GIPSA (Federal Grain Inspection Service). Prepared by HGA.

IHGC AROMA ACREAGE 2005 – 2009

COUNTRY	AROMA ACREAGE (IN ACRES)					2008-09
	2005	2006	2007	2008	2009	% +/-
Australia	16	15	22	82	67	-18.18%
Austria			462	479	462	-3.61%
Belgium*	121	86	106	126	126	0.00%
Bulgaria*	178	178	178	178	69	-61.11%
China*	1,331	1,352	1,359	1,433	1,433	0.00%
Czech Rep.	13,323	12,899	12,664	12,486	12,299	-1.50%
France	1,781	1,772	1,814	1,814	1,068	-41.14%
Germany	24,166	24,622	24,998	25,386	23,673	-6.75%
New Zealand*	625	554	556	531	568	6.98%
Poland	2,109	2,073	1,942	1,905	1,905	0.00%
Portugal*	0	0	0	0	0	0.00%
Russia*	692	482	395	376	376	0.00%
Serbia*	116	84	84	84	84	0.00%
Slovakia	865	865	741	531	581	9.30%
Slovenia	3,433	3,459	3,415	3,615	3,623	0.21%
South Africa*	0	0	0	0	0	0.00%
Spain	0	0	0	0	0	0.00%
Ukraine	2,211	2,212	1,527	1,606	1,589	-1.08%
UK - England	2,179	1,937	1,977	1,977	2,002	1.25%
USA	10,648	10,853	10,977	15,182	15,005	-1.17%
IHGC Total	61,997	63,442	63,218	67,792	64,928	-4.22%

*Countries with partial provided report updates for the IHGC. Missing figures were used from previous reports or from IHGC estimates.

SOURCE: IHGC Economic Commission annual reports.
Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC ALPHA ACREAGE 2005 – 2009

COUNTRY	ALPHA ACREAGE (IN ACRES)					2008-09
	2005	2006	2007	2008	2009	% +/-
Australia	1,094	904	1,068	1,114	1,203	7.98%
Austria			32	32	52	61.54%
Belgium*	326	361	329	334	334	0.00%
Bulgaria*	368	368	368	368	326	-11.41%
China*	9,540	3,558	12,553	12,889	12,889	0.00%
Czech Rep.	576	210	168	178	180	1.39%
France	100	96	91	94	99	5.26%
Germany	17,243	16,625	16,378	17,883	20,228	13.11%
New Zealand*	371	319	309	371	420	13.33%
Poland	3,421	3,447	3,442	3,613	3,613	0.00%
Portugal*	91	91	91	91	91	0.00%
Russia*	652	556	168	168	168	0.00%

Serbia*	291	82	82	62	82	32.00%
Slovakia	0	0	0	0	0	0.00%
Slovenia	178	148	183	171	156	-8.70%
South Africa*	1,250	1,082	1,082	1,097	1,189	8.33%
Spain	1,680	1,483	1,216	1,149	1,156	0.65%
Ukraine	1,405	1,406	1,021	724	808	11.60%
UK – England	753	603	642	642	667	3.85%
USA	18,540	18,582	19,934	25,717	25,121	-2.32%
IHGC Total	57,776	49,923	59,158	66,697	68,783	3.13%

*Countries with partial provided report updates for the IHGC. Missing figures were used from previous reports or from IHGC estimates.

SOURCE: IHGC Economic Commission annual reports.
Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC TOTAL ACREAGE 2005 – 2009

COUNTRY	TOTAL ACREAGE (IN ACRES)					2008-09 % +/-
	2005	2006	2007	2008	2009	
Australia	1,109	899	1,090	1,090	1,270	16.55%
Austria			494	519	514	-0.95%
Belgium	447	447	435	460	460	0.00%
Bulgaria	546	546	546	546	395	-27.60%
China	11,486	4,910	13,912	14,322	14,322	0.00%
Czech Rep.	14,010	13,109	12,832	12,664	12,479	-1.46%
France	1,978	1,871	1,905	1,910	1,166	-38.94%
Germany	42,402	41,247	41,376	43,269	43,902	1.46%
New Zealand	995	872	865	902	988	9.59%
Poland	5,530	5,520	5,385	5,291	5,518	4.30%
Portugal	91	91	91	91	91	0.00%
Russia	1,344	1,038	563	544	544	0.00%
Serbia	408	166	166	188	166	-11.84%
Slovakia	865	865	741	531	581	9.30%
Slovenia	3,732	3,608	3,598	4,003	3,778	-5.62%
South Africa	1,250	1,082	1,082	1,097	1,189	8.33%
Spain	1,680	1,483	1,216	1,216	1,156	-4.88%
Ukraine	3,616	3,618	2,548	2,481	2,397	-3.39%
UK - England	2,932	2,609	2,619	2,718	2,669	-1.82%
USA	29,188	29,435	30,911	39,263	40,126	2.20%
IHGC Total	123,609	113,417	122,376	133,106	133,711	0.45%

*Countries with partial provided report updates for the IHGC. Missing figures were used from previous reports or from IHGC estimates.

SOURCE: IHGC Economic Commission annual reports. IHGC Total Acreage includes baby acreage (not included in separate aroma and alpha tables. Numbers may not total exactly due to rounding and standard/metric conversions.

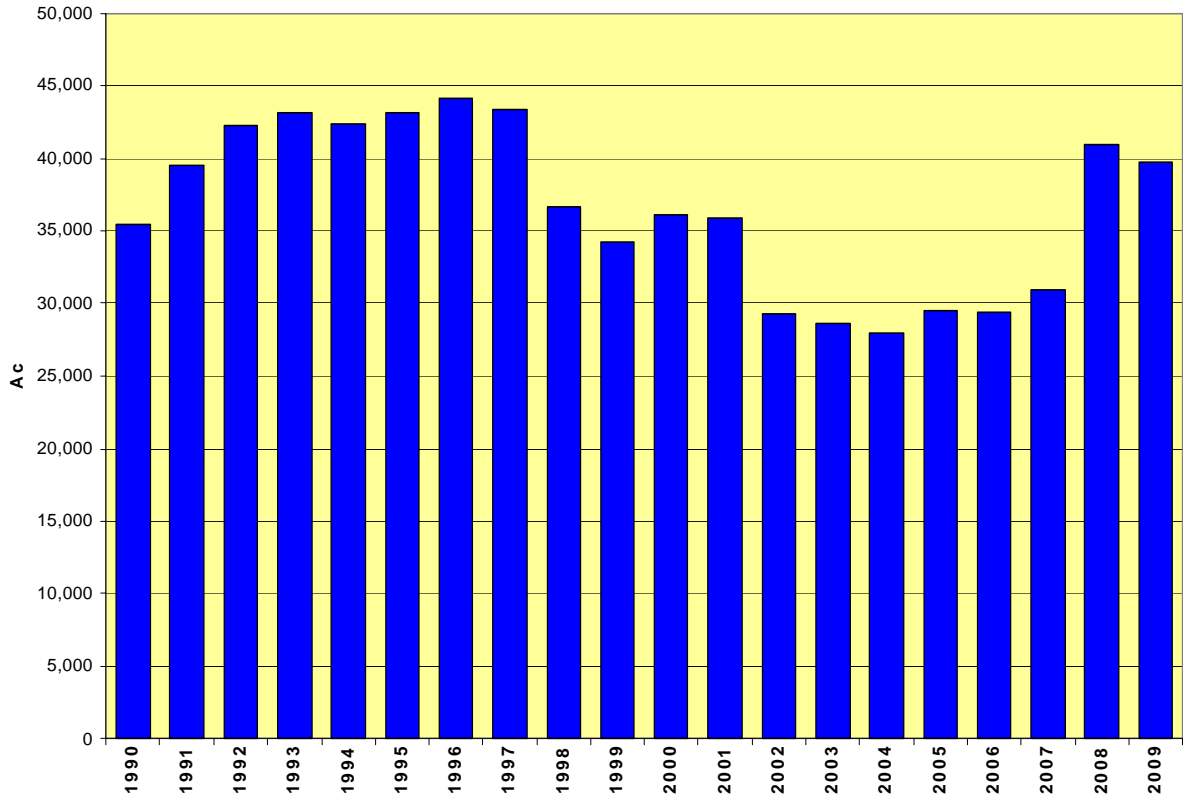
2009 IHGC HOP ACREAGE AND PRODUCTION 2009

COUNTRY	HOP ACREAGE (acres)				HOP PRODUCTION (pounds)			
	AROMA	ALPHA	TOTAL	NEW	AROMA	ALPHA	TOTAL	Alpha MT.
Australia	67	1,203	1,270	0	116,844	2,843,934	2,960,778	166
Austria	462	52	514	42	670,198	83,775	753,973	30
Belgium*	126	334	460	0	158,731	623,902	782,633	32
Bulgaria*	69	326	395	0	68,343	335,099	403,442	19
China*	1,433	12,889	14,322	0	3,527,360	31,966,700	35,494,060	860
Czech Rep.	12,299	180	12,479	635	13,756,704	352,736	14,109,440	268
France	1,068	99	1,166	158	1,657,859	145,504	1,803,363	29
Germany	23,673	20,228	43,902	1,745	33,840,610	35,053,140	68,893,750	3,520
New Zealand*	568	420	988	86	981,047	853,180	1,834,227	95
Poland	1,905	3,613	5,518	0	2,396,400	5,200,651	7,597,052	256
Portugal*	0	91	91	0	0	125,662	125,662	6
Russia*	376	168	544	0	242,506	110,230	352,736	7
Serbia*	84	82	166	30	127,867	167,550	295,416	11
Slovakia	581	0	581	0	529,104	0	529,104	10
Slovenia	3,623	156	3,778	124	5,048,534	242,506	5,291,040	145
South Africa*	0	1,189	1,189	91	0	1,779,112	1,779,112	99
Spain	0	1,156	1,156	22	0	2,244,283	2,244,283	129
Ukraine	1,589	808	2,397	684	2,204,600	749,564	2,954,164	76
UK - England	2,002	667	2,669	49	2,204,600	992,070	3,196,670	104
USA	15,005	25,121	40,126	0	24,250,600	67,240,300	91,490,900	4,690
2008 IHGC Totals	64,928	68,783	133,711	3,667	91,781,907	151,109,898	242,891,805	10,552

SOURCE: November 2009 IHGC Economic Commission Report. Numbers may not total exactly due to rounding and standard/metric conversions.

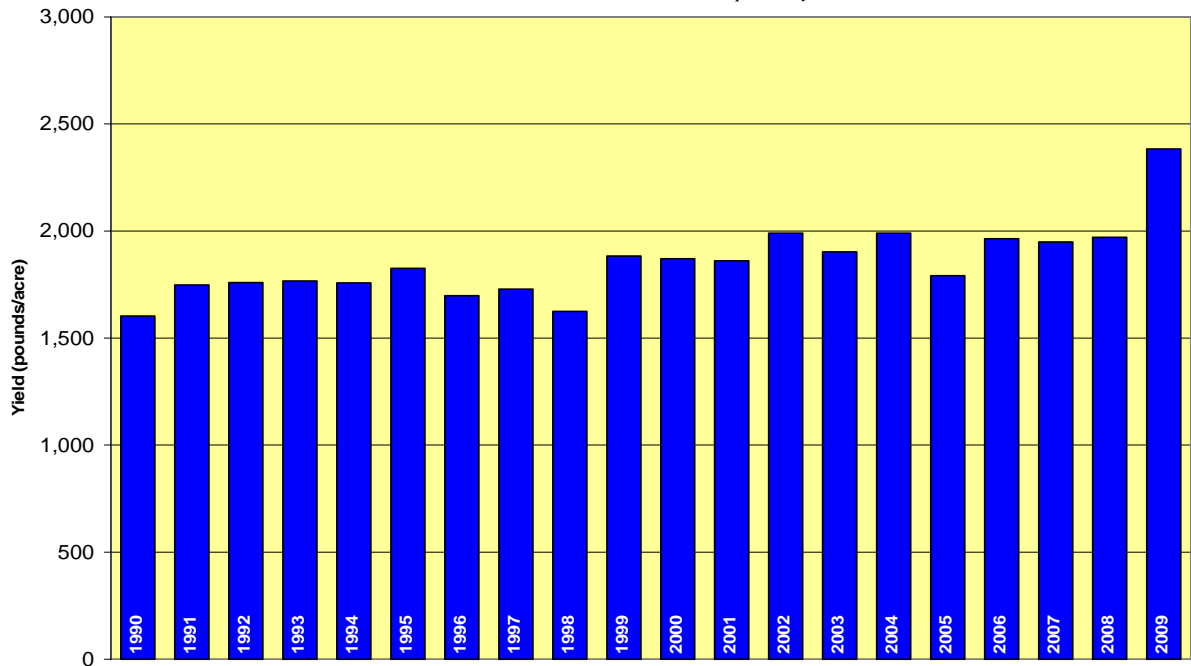
U.S. TOTAL HOP ACREAGE 1990 – 2009 (20 YEARS)

Source: USDA-NASS. Prepared by HGA.



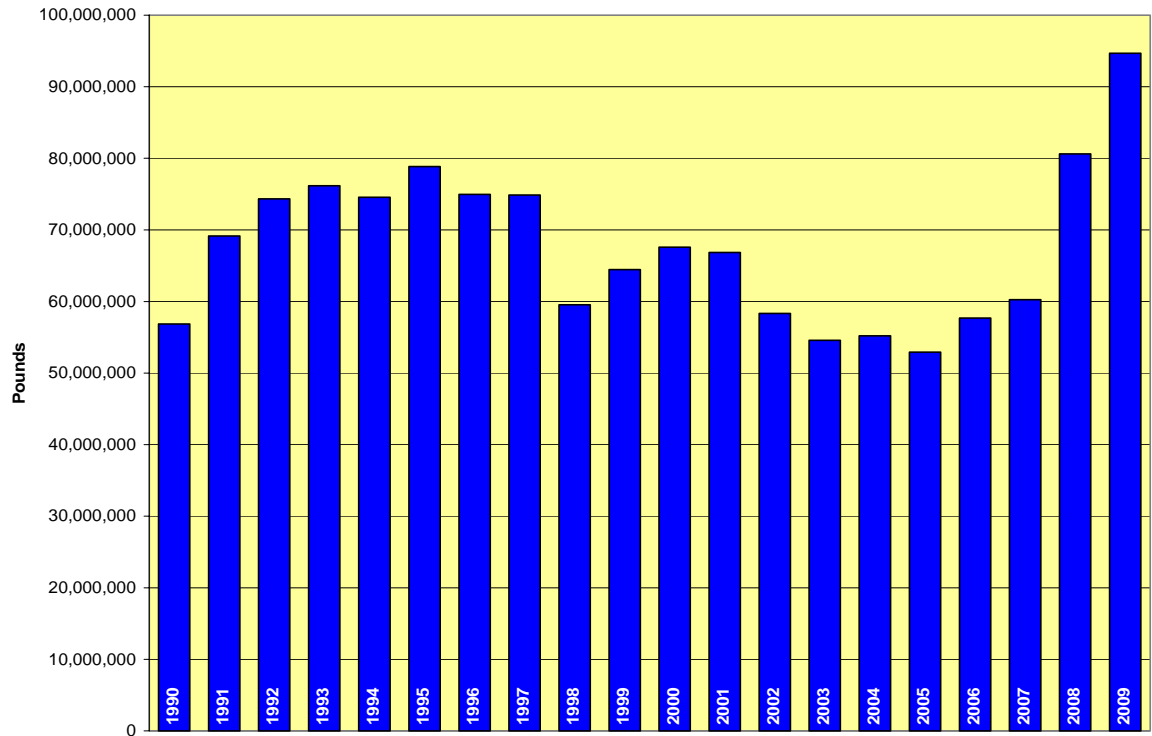
U.S. AVERAGE YIELD PER ACRE 1990 – 2009 (20 YEARS)

Source: USDA-NASS. Prepared by HGA.



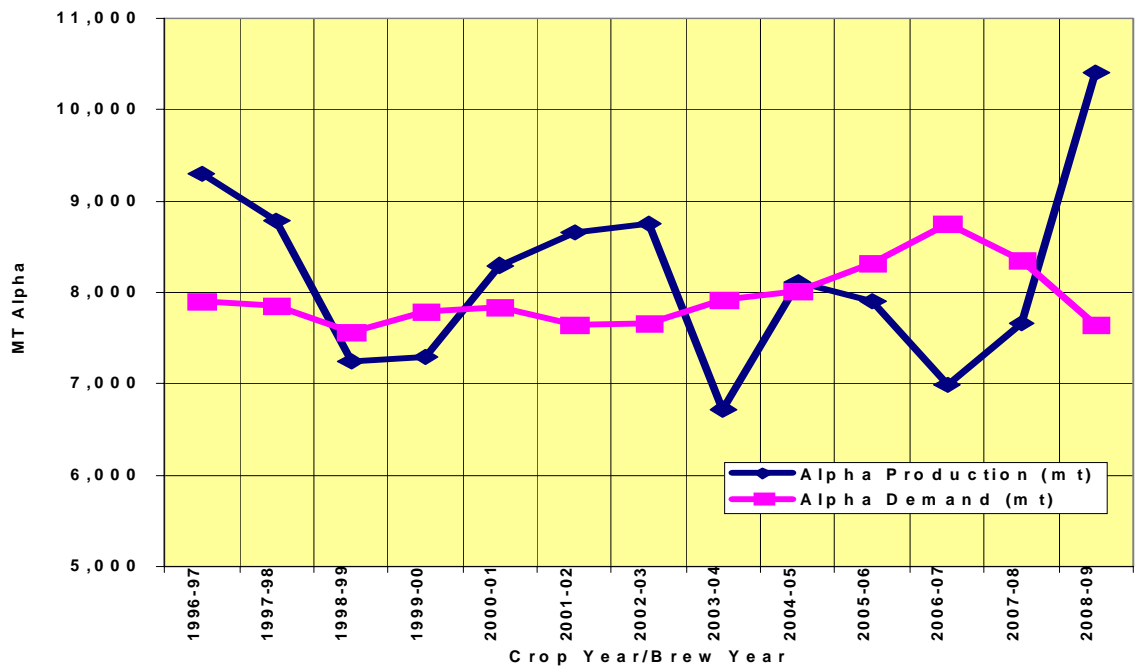
U.S. TOTAL PRODUCTION 1990 – 2009 (20 YEARS)

Source: USDA-NASS. Prepared by HGA.

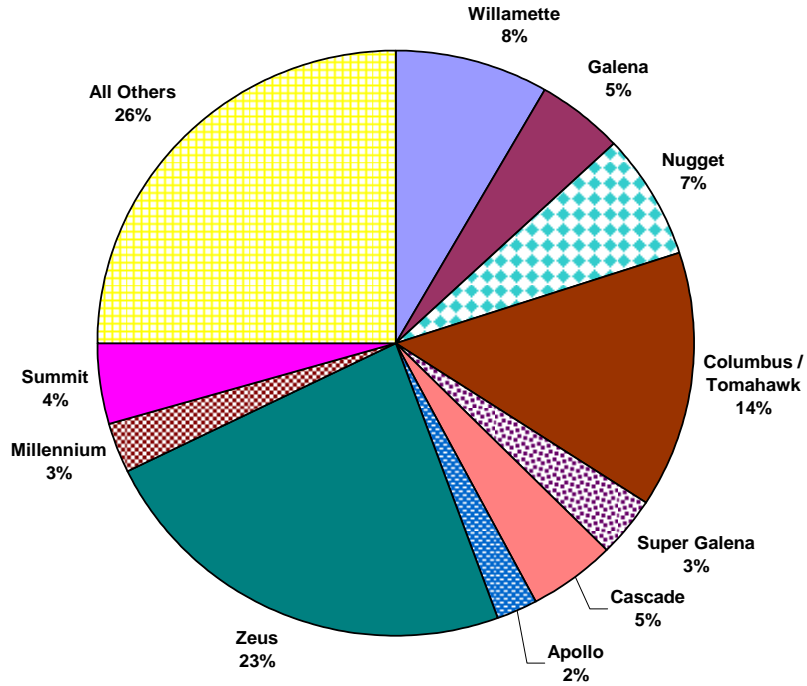


WORLD ALPHA PRODUCTION & DEMAND 1996 – 2009 (13 YEARS)

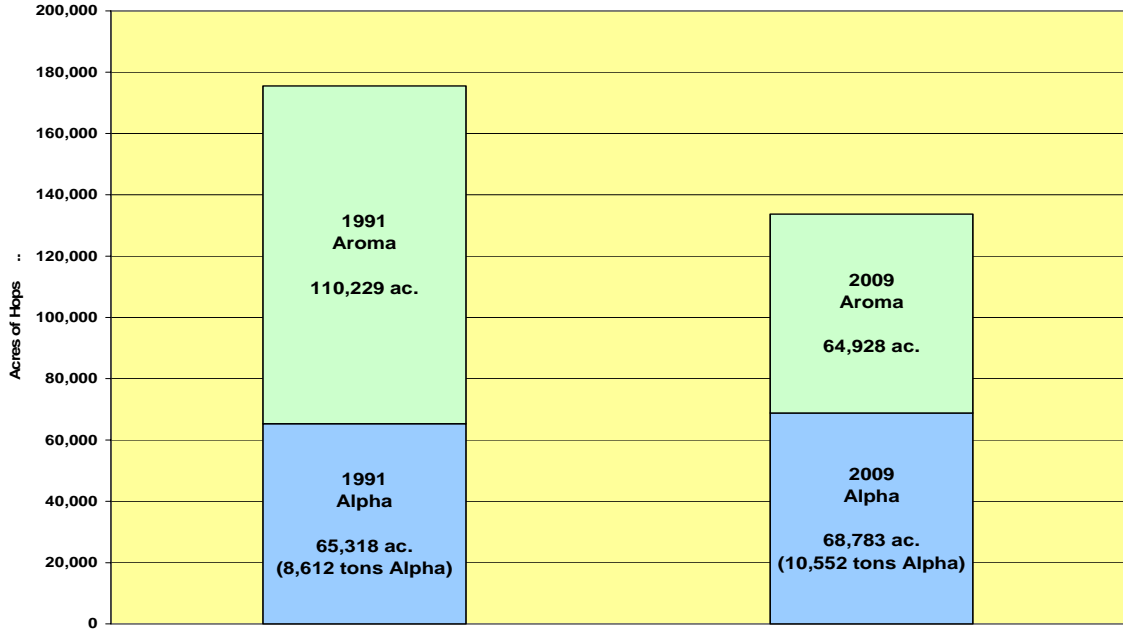
Source: 2008-09 Barth Report.



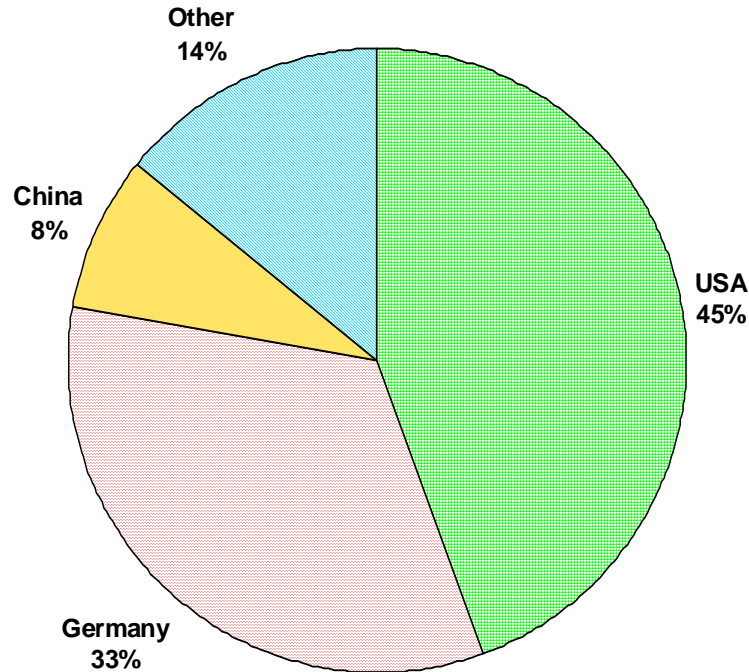
MOST WIDELY-PLANTED 2009 VARIETIES PRODUCED IN THE U.S. AND THE % OF THE TOTAL U.S. PRODUCTION THEY REPRESENT



COMPOSITION OF WORLD HOP ACREAGE 1991 VERSUS 2009



SOURCE: IHGC November Reports, MT Alpha. Prepared by HGA.

WORLD'S LARGEST ALPHA PRODUCERS - 2009

SOURCE: IHGC November Reports, MT Alpha. Prepared by HGA.

U.S. & GERMAN ALPHA ACID PRODUCTION 2000-2009(10 YEARS)

YEAR	UNITED STATES				GERMANY			
	Pounds of Hops (x 1,000)	MT Hops	MT Alpha	Avg. Alpha %*	Pounds of Hops (x 1,000)	MT Hops	MT Alpha	Avg. Alpha %*
2000	68,019	30,853	3,290	10.7%	62,709	28,445	2,526	8.9%
2001	66,004	29,939	3,450	11.5%	68,343	31,000	2,580	8.3%
2002	56,912	25,815	3,140	12.2%	69,445	31,500	2,951	9.4%
2003	54,039	24,512	2,900	11.8%	55,115	25,000	1,825	7.3%
2004	55,538	25,192	2,900	11.5%	73,854	33,500	2,915	8.7%
2005	51,796	23,495	2,600	11.1%	75,397	34,200	3,272	9.6%
2006	53,815	24,410	2,929	12.0%	62,832	28,500	2,328	8.2%
2007	58,988	26,757	3,280	12.3%	70,854	32,139	2,880	9.0%
2008	80,630	36,574	4,150	11.3%	70,854	32,139	4,100	12.8%
2009	91,491	41,500	4,690	11.3%	87,104	39,510	3,520	8.9%

SOURCE: IHGC November Economic Commission reports. Prepared by HGA.

*Figures presented in the chart are the result of dividing the estimated MT Alpha by MT Hops for each year. This does not represent an estimate based on any type of analytical procedure.

WORLD HOP ACREAGE & PERCENT SHARE (acres)

COUNTRY	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Germany	45,915 32%	46,965 33%	45,318 33%	40,879 32%	43,168 36%	42,404 34%	41,247 36%	41,376 34%	43,269 33%	43,902 33%
England	4,828 3%	5,035 3%	4,681 3%	3,538 3%	3,354 2.70%	2,932 2%	2,609 2%	2,619 2%	2,718 2%	2,669 2%
Czech Rep.	16,703 12%	15,864 11%	14,735 11%	14,417 11%	14,420 12%	14,010 11%	13,109 12%	12,832 11%	12,664 10%	12,479 9%
Europe (rest)	25,682 18%	24,679 17%	23,616 17%	22,217 18%	20,666 17.20%	20,236 16%	19,253 17%	17,313 14%	17,236 13%	16,222 12%
USA	36,404 25%	35,891 25%	29,309 22%	28,669 23%	28,020 23.30%	29,188 24%	29,435 26%	30,911 25%	39,263 29%	40,126 30%
China	10,829 7%	11,884 8%	13,930 10%	13,931 11%	11,697 9.70%	11,846 10%	4,910 4%	13,912 11%	14,322 11%	14,322 11%
World (rest)	3,255 2%	4,139 3%	4,364 3%	3,211 3%	3,607 3%	3,354 3%	2,853 3%	3,047 2%	3,633 3%	3,991 3%
World Totals	143,616	144,457	135,944	126,862	119,943	123,609	113,417	122,010	133,105	133,711

SOURCE: IHGC Economic Commission November 2009 report. Prepared by HGA

WORLD HOP PRODUCTION & PERCENT SHARE (pounds x 1,000)

COUNTRY	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Germany	62,709 30%	68,343 32%	69,444 34%	55,115 30%	73,854 36.30%	75,397 37%	62,831 35%	70,854 35%	87,104 36%	68,894 28%
England	6,082 3%	6,019 3%	5,849 3%	4,202 2%	3,525 1.70%	3,732 2%	3,109 2%	3,108 2%	2,976 1%	3,197 1%
Czech	10,815 5.10%	14,669 7%	13,668 7%	11,219 6%	13,889 6.80%	15,238 8%	11,530 6%	12,414 6%	14,771 6%	14,109 6%
Europe (rest)	23,174 11%	22,704 11%	18,178 9%	20,388 11%	23,745 11.60%	24,960 12%	21,312 12%	20,891 10%	23,115 9%	22,780 9%
USA	67,576 32%	66,832 31%	58,336 28%	54,565 30%	55,200 27%	51,796 26%	53,815 30%	58,989 29%	76,235 31%	91,491 38%
China	33,152 15%	29,786 14%	31,224 15%	30,662 17%	25,882 12.70%	23,315 12%	20,944 12%	29,762 15%	35,494 14%	35,494 15%
World (rest)	7,937 4%	8,114 4%	9,332 5%	8,013 4%	7,095 3.5%	6,682 3%	5,227 3%	5,489 3%	5,324 2%	6,927 3%
World Totals	211,445	215,639	206,031	184,164	203,259	201,122	178,768	201,507	245,019	242,892

SOURCE: IHGC Economic Commission November 2009 report. Prepared by HGA

MARCH 1 & SEPTEMBER 1 U.S. HOP STOCKS 1994 – 2009

Year	MARCH 1			SEPTEMBER 1		
	Brewer	Dealer / Grower	TOTAL	Brewer	Dealer / Grower	TOTAL
1994	58,200	32,600	90,800	47,070	15,930	63,000
1995	57,900	31,400	89,300	42,800	13,100	55,900
1996	55,900	25,500	81,400	47,000	11,700	58,700
1997	53,000	26,000	79,000	44,500	17,500	62,000
1998	50,500	25,000	75,500	41,000	14,000	55,000
1999	50,000	25,000	75,000	39,500	14,500	54,000
2000	43,500	21,000	64,500	37,500	10,500	48,000
2001	44,500	22,500	67,000	38,000	16,000	54,000
2002	45,000	44,000	89,000	30,000	35,000	65,000
2003	41,000	41,000	82,000	34,000	35,000	69,000
2004	37,000	48,000	85,000	30,000	31,000	61,000
2005	43,000	33,000	76,000	33,000	27,000	60,000
2006	39,000	30,000	69,000	35,000	14,000	49,000
2007	42,000	28,000	70,000	31,000	16,000	47,000
2008	36,000	30,000	66,000	29,000	18,000	47,000
2009	40,000	42,000	82,000	40,000	25,000	65,000

SOURCE: USDA NASS. Prepared by HGA.

Includes equivalent pounds of dry hops held in form of extract or pellets. These numbers include all stocks held by growers, dealers or brewers that are physically stored on US soil at the time of the report, including both domestic and foreign hops.

U.S. IMPORTS OF HOPS - 2004-05 through 2008-09

(In pounds; extract converted at 4:1 ratio)

Country	2004-05	2005-06	2006-07	2007-08	2008-09
GERMANY	8,086,326	8,408,200	7,973,229	7,484,685	8,133,064
AUSTRALIA	578,492	423,287	450,845	783,301	1,533,975
UNITED KINGDOM	433,869	683,212	613,325	1,762,153	804,025
SLOVENIA	16,314	34,172	106,704	175,047	372,360
NEW ZEALAND	190,259	67,241	124,561	107,365	329,591
FRANCE	98,106	8,157	9,480	142,198	136,246
CZECH REPUBLIC	160,937	132,718	69,005	119,490	130,514
BELGIUM-LUXEMBOURG	37,919	15,873	7,055	0	48,502
ITALY	0	0	0	38,801	19,401
POLAND	11,684	11,684	25,133	6,834	7,275
CHINA	8,818	0	119,931	13,228	2,205
ARGENTINA	0	0	90,830	145,946	882
ETHIOPIA	0	0	3,307	8,598	661
SERBIA, MONTENEGRO	882	0	0	0	0
SPAIN	0	0	0	1,764	0
AUSTRIA	0	1,984	661	0	0
VENEZUELA	0	0	0	95,240	0
VIETNAM	0	0	0	661	0
HONG KONG	0	0	0	2,205	0
Grand Total	9,623,607	9,786,529	9,594,065	10,887,516	11,518,699

SOURCE: U.S.D.A. Foreign Agricultural Service. Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS, TOP 40 COUNTRIES - 2004-05 through 2008-09
(In pounds; extract converted at 4:1 ratio)

Country	2004-05	2005-06	2006-07	2007-08	2008-09
GERMANY	3,747,413	3,282,679	6,689,919	6,561,390	10,149,850
MEXICO	7,223,437	5,046,816	2,985,937	4,295,041	9,408,216
BELGIUM-LUXEMBOURG	7,945,671	6,162,574	5,472,528	4,790,639	8,837,219
UNITED KINGDOM	2,955,734	3,599,263	3,621,970	5,784,041	5,594,664
CANADA	5,479,803	2,926,854	2,538,399	5,083,633	5,077,901
BRAZIL	4,277,845	5,564,240	4,159,457	3,563,548	4,905,280
COLOMBIA	1,283,530	923,515	2,063,083	2,066,611	2,379,005
CHINA	2,921,783	3,800,103	3,629,686	4,471,851	2,303,167
JAPAN	1,162,496	1,436,751	1,628,773	1,772,294	2,296,332
THAILAND	1,954,616	1,203,502	859,581	1,154,339	1,976,442
PERU	1,462,104	906,319	784,404	1,504,653	1,487,678
AUSTRALIA	1,152,134	1,164,260	951,955	609,577	1,263,909
KOREA, SOUTH	2,578,303	1,332,913	661,827	1,349,668	1,197,770
HONG KONG	1,136,041	300,049	951,955	1,815,064	1,077,398
POLAND	13,228	115,522	204,368	3,211,911	960,332
ARGENTINA	859,581	866,636	1,466,954	1,387,808	921,531
PHILIPPINES	957,246	620,601	649,922	657,859	841,724
CHILE	632,285	599,877	660,945	651,686	821,882
VIETNAM	479,946	113,097	422,405	570,776	741,193
DOMINICAN REPUBLIC	2,050,738	1,116,199	726,643	662,488	714,517
VENEZUELA	1,763,476	2,326,756	2,432,137	1,255,531	689,164
INDIA	26,676	66,359	399,477	546,525	646,615
ECUADOR	307,765	281,530	369,935	659,181	585,988
RUSSIA	866,857	269,184	761,476	1,586,665	582,020
FINLAND	66,139	0	0	0	453,270
IRELAND	362,660	284,176	470,466	488,985	318,127
NIGERIA	897,721	244,272	1,060,863	561,737	302,033
HONDURAS	74,957	146,387	274,255	312,174	295,419
KENYA	4,409	0	263,232	290,128	263,452
SOUTH AFRICA	21,164	0	2,646	684,314	259,925
EL SALVADOR	52,911	61,509	106,704	326,284	216,494
CAMBODIA	0	0	87,303	101,633	212,305
SINGAPORE	147,269	125,002	246,036	289,246	210,982
MALAYSIA	192,243	289,246	173,063	265,436	203,707
PANAMA	132,277	194,447	126,104	201,502	202,384
MAURITIUS	0	0	16,755	0	197,534
HAITI	105,822	111,995	123,459	97,003	176,370
TURKEY	137,127	83,776	91,712	50,706	164,244
BOLIVIA	249,122	229,060	250,004	115,081	145,064
GHANA	86,421	186,952	201,061	268,964	143,741
ALL OTHER COUNTRIES	3,577,437	3,239,028	3,561,564	2,853,660	1,909,642
Grand Total	59,346,386	49,221,448	52,148,963	62,919,634	71,134,489

SOURCE: U.S. D.A. Foreign Agricultural Service. Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS BY PRODUCT (TOP 40) – 2009 (In pounds; extract is converted to fresh hop equivalent at a ratio of 4:1)

Country	PELLETS	FRESH/DRIED	GROUND	EXTRACT	TOTAL
GERMANY	1,329,606	162,260	0	8,657,984	10,149,850
MEXICO	453,049		0	8,955,166	9,408,216
BELGIUM- LUXEMBOURG	1,850,117	52,249		6,934,853	8,837,219
UNITED KINGDOM	1,434,987	332,898	17,196	3,809,583	5,594,664
CANADA	4,214,572	24,471	170,417	668,441	5,077,901
BRAZIL	2,441,617	7,716	0	2,455,947	4,905,280
COLOMBIA	1,662,945	197,975	289,687	228,399	2,379,005
CHINA	442,688	0	7,716	1,852,763	2,303,167
JAPAN	1,265,231	275,798	207,675	547,628	2,296,332
THAILAND	39,904	0		1,936,538	1,976,442
PERU	752,216			735,461	1,487,678
AUSTRALIA	402,343	2,205	2,205	857,156	1,263,909
KOREA, SOUTH	244,713		1,543	951,514	1,197,770
HONG KONG	130,073		1,102	946,223	1,077,398
POLAND	910,949			49,383	960,332
ARGENTINA	420,641	0	0	500,890	921,531
PHILIPPINES	373,463	0		468,261	841,724
CHILE	165,126		661	656,095	821,882
VIETNAM	14,550			726,643	741,193
DOMINICAN REPUBLIC	24,030	0	0	690,487	714,517
VENEZUELA	2,425	1,543	0	685,196	689,164
INDIA	141,316	3,527	0	501,772	646,615
ECUADOR	361,117		3,527	221,344	585,988
RUSSIA	121,695	0		460,325	582,020
FINLAND				453,270	453,270
IRELAND	2,425	0	0	315,702	318,127
NIGERIA	145,946			156,087	302,033
HONDURAS				295,419	295,419
KENYA	60,627			202,825	263,452
SOUTH AFRICA	0		22,708	237,217	259,925
EL SALVADOR	19,842		0	196,652	216,494
CAMBODIA		0	661	211,644	212,305
SINGAPORE	0	0	2,866	208,116	210,982
MALAYSIA	0		0	203,707	203,707
PANAMA	108,908	0	0	93,476	202,384
MAURITIUS				197,534	197,534
HAITI	0			176,370	176,370
TURKEY	0	0	30,203	134,041	164,244
BOLIVIA	141,537			3,527	145,064
GHANA		0		143,741	143,741
ALL OTHER COUNTRIES	292,112	62,170	35,053	1,520,306	1,909,642
Grand Total	19,970,771	1,122,813	793,222	49,247,683	71,134,489

SOURCE: U.S. D.A. Foreign Agricultural Service. Prepared by Bryant Christie Inc.

WORLD BEER PRODUCTION 2006-2009 (MILLION HL)

	2006	2007	2008	2009
Russia	99.8	116.0	115.3	110.0
Germany	106.8	103.9	102.8	98.2
Great Britain	54.1	50.5	49.5	46.8
Poland	33.0	32.5	35.6	33.5
Spain	33.6	33.2	33.4	32.8
Ukraine	27.2	31.5	32.0	29.5
Netherlands	26.5	28.0	26.8	25.8
Romania	17.0	19.5	20.8	20.5
Czech Republic	19.8	19.8	19.8	19.8
Belgium	18.3	18.6	17.8	17.1
France	17.0	15.1	14.4	13.8
Italy	12.8	13.5	12.8	12.8
Turkey	9.1	9.2	9.9	9.6
Austria	8.9	9.0	8.5	8.5
Ireland	9.2	9.3	8.9	8.4
Portugal	8.2	8.2	8.2	7.8
Other Europe	71.0	70.8	69.5	66.6
Total Europe	572.3	588.6	586.0	561.5
USA	231.6	233.4	234.1	234.1
Brazil	94.0	96.0	106.3	107.3
Mexico	78.1	81.0	82.3	82.5
Canada	23.6	23.9	23.7	23.7
Venezuela	23.0	26.3	24.0	23.4
Colombia	15.0	19.0	19.0	19.2
Argentina	13.9	14.5	15.5	15.8
Other Americas	38.8	38.9	41.8	43.2
Total Americas	518.0	533.0	546.7	549.2
China	352.0	393.0	410.3	418.5
Japan	63.0	62.7	61.0	61.0
Thailand	23.0	22.0	20.7	20.0
South Korea	18.0	18.0	18.6	18.5
Vietnam	17.0	18.4	18.5	18.5
Philippines	13.5	13.7	13.3	13.5
Other Asia	27.1	30.1	32.4	31.7
Total Asia	513.6	557.9	574.8	581.7
South Africa	26.5	26.5	25.9	26.0
Nigeria	11.0	12.3	15.2	15.5
Other Africa	41.1	39.6	45.0	47.2
Total Africa	78.6	78.4	86.1	88.7
Australia	17.2	16.9	17.0	17.0
New Zealand	3.1	3.4	3.2	3.4
Oceania	1.0	1.2	0.7	0.9
Total Australia	21.3	21.5	21.4	21.6
WORLD TOTALS	1,703.7	1,779.4	1,815.0	1,802.7

Source: Hopsteiner – Guidelines for Hop Buying 2009. Prepared by HGA.

WORLD BEER PRODUCTION BY BREWERY (TOP 10) - 1988 (MILLION HL)

Brewery	1988 Production	1988 % Share
Anheuser-Busch	90	7%
Miller	47	4%
Heineken	43	3%
Kirin	30	2%
Bond	30	2%
Stroh	25	2%
Elders	21	2%
Kronenbourg	20	2%
Coors	20	2%
Brahma	18	1%
Top 10 total	344	26%

WORLD BEER PRODUCTION BY BREWERY (TOP 10) - 2008 (MILLION HL)

Brewery	2008 Production	2008 % Share
ABI	388	21%
SAB Miller Coors	217	12%
Heineken - Femsas*	202	11%
Carlsberg	109	6%
China Resource	73	4%
Tsingtao	54	3%
Modelo	51	3%
Yanjing	42	2%
Asahi	23	1%
Top 10 total	1159	64%

SOURCE: Leslie Roy, Roy Farms.

* Heineken acquired Femsas in January 2009. 2008 production and market share have been combined. The top 3 brewing groups now control 44% of the market share.