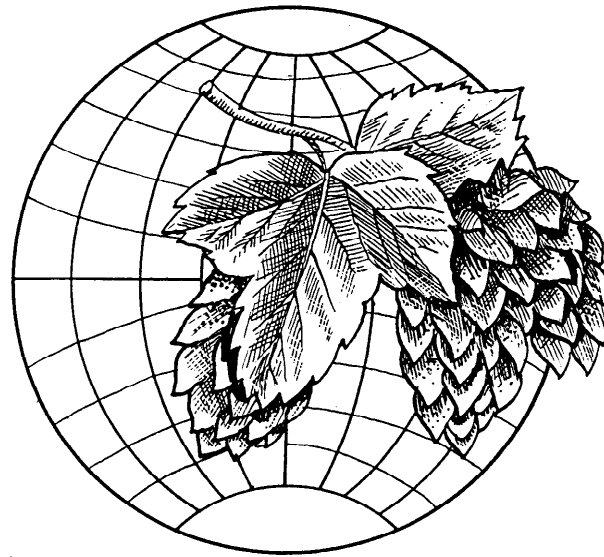


# INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

SAN CARLOS DE BARILOCHE, ARGENTINA

FEBRUARY, 2020



# International Hop Growers' Convention

## IHGC - Economic Commission Summary Reports

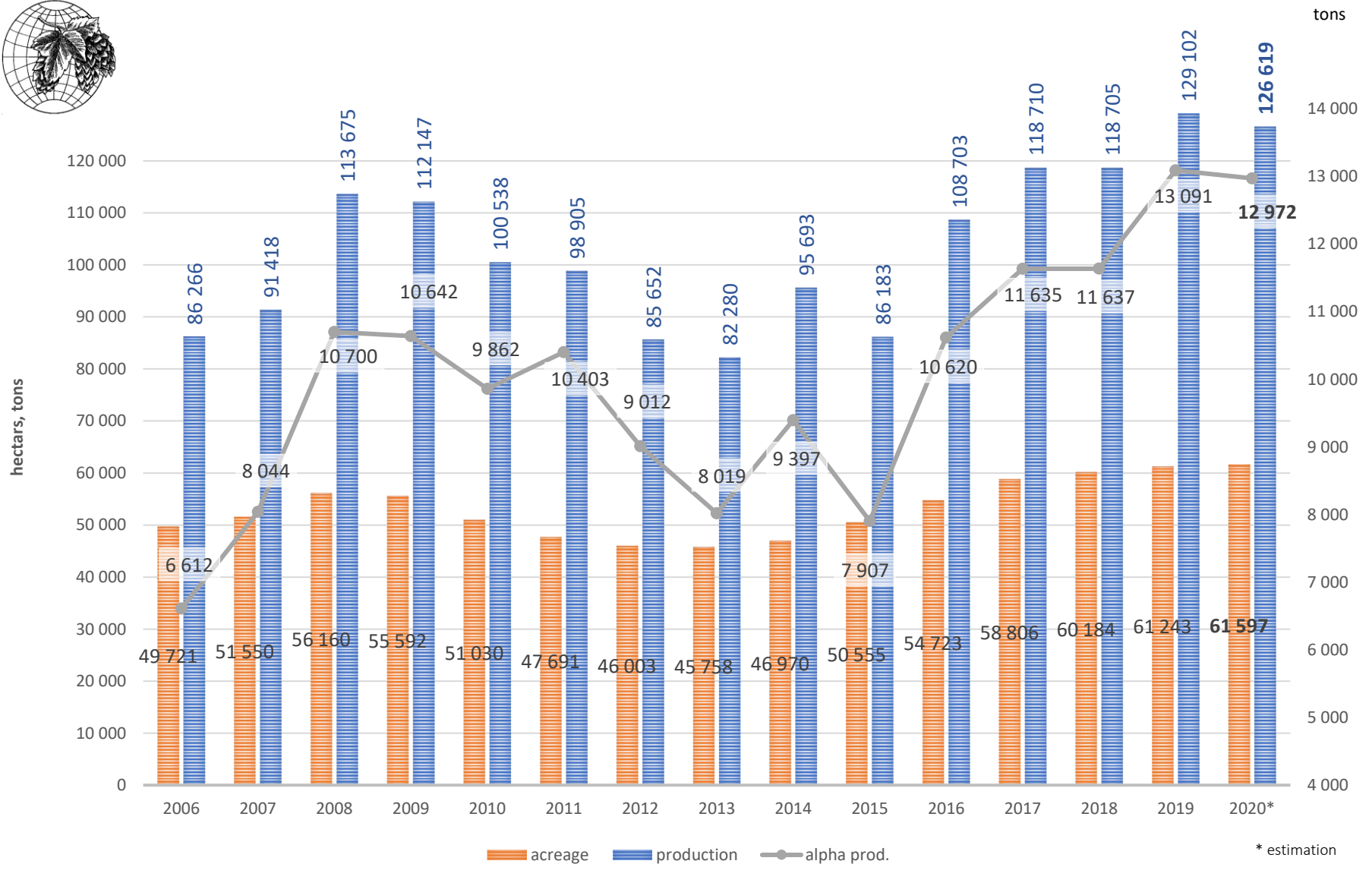
San Carlos de Bariloche, Argentina - February 27, 2020

Country	Hop Acreage 2019 (Hectares, Ha)					Hop Production 2019 (in MT = 1.000 kg)			Alpha acid Prod. MT	Hop Acreage 2020 (Hectares, Ha) estimations					Hop Production 2020 (in MT = 1.000 kg) estimations			Alpha acid Prod. MT
	Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total		Aroma	Alpha	Hop area <sup>1</sup>	New	Total	Aroma	Alpha	Total	
Argentina <sup>o</sup>	100	60	160	0	160	110	50	160	10	100	60	160	0	160	110	50	160	10
Australia <sup>o</sup>	476	176	652	48	700	1 385	260	1 645	217	476	176	652	48	700	1 385	260	1 645	217
Austria <sup>o</sup>	194	58	253	3	253	368	124	492	38	194	58	253	3	253	368	124	492	38
Belgium	124	58	182	0	182	172	124	296	24	124	58	182	0	182	165	115	280	21
Canada <sup>o</sup>	219	200	419	0	419	329	300	629	63	219	200	419	0	419	329	300	629	63
China <sup>o</sup>	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	4 706	49	4 755	248	5 003	6 991	154	7 145	285	4 670	63	4 755	270	5 003	6 180	120	6 400	250
France <sup>o</sup>	440	26	466	39	505	728	94	822	34	440	26	466	39	505	728	94	822	34
Germany	10 860	8 913	19 773	644	20 417	22 584	25 888	48 472	5 200	11 000	9 000	20 000	600	20 600	22 000	25 000	47 000	5 200
Japan <sup>o</sup>	53	53	106	0	106	82	120	202	25	53	53	106	0	106	82	120	202	25
New Zealand <sup>o</sup>	598	145	743	331	743	780	239	1 019	100	598	145	743	331	743	780	239	1 019	100
Poland	646	1 016	1 662	20	1 682	1 000	1 900	2 900	244	656	1 026	1 682	20	1 682	900	1 700	2 600	230
Romania <sup>o</sup>	75	185	260	3	263	90	105	195	20	75	185	260	3	263	90	105	195	20
Russia <sup>o</sup>	168	74	242	12	254	200	150	350	20	168	74	242	12	254	200	150	350	20
Serbia <sup>o</sup>	0	0	8	0	8	0	0	16	2	0	0	8	0	8	0	0	16	2
Slovakia <sup>o</sup>	129	0	129	4	133	108	0	108	5	129	0	129	4	133	108	0	108	5
Slovenia	1 500	21	1 521	75	1 596	2 502	70	2 572	131	1 430	21	1 451	0	1 451	2 230	70	2 300	120
South Africa <sup>o</sup>	73	354	427	0	427	77	677	754	75	73	354	427	0	427	77	677	754	75
Spain <sup>o</sup>	0	535	535	0	535	0	830	830	94	0	535	535	0	535	0	830	830	94
Ukraine <sup>o</sup>	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30
UK-England	787	171	958	0	958	1 353	343	1 696	119	753	168	921	0	921	1 300	343	1 643	118
USA	18 005	5 842	23 847	468	23 847	35 160	16 115	51 275	5 755	18 300	5 900	24 200	0	24 200	35 400	16 250	51 650	5 700
<b>IHGC</b>	<b>39 862</b>	<b>20 279</b>	<b>60 150</b>	<b>1 895</b>	<b>61 243</b>	<b>74 963</b>	<b>54 123</b>	<b>129 102</b>	<b>13 091</b>	<b>40 167</b>	<b>20 445</b>	<b>60 643</b>	<b>1 330</b>	<b>61 597</b>	<b>73 376</b>	<b>53 127</b>	<b>126 619</b>	<b>12 972</b>

<sup>o</sup> Since no country updates were available, figures from Nuremberg in 2019 were used.

<sup>1</sup> Acreage without new hop areas

Difference $\Sigma$ 2020-2019	305	166	493	-565	354	-1 587	-996	-2 483	-119
Difference $\Sigma$ 2020-2015	8 351	3 717	11 999	-3 512	11 042	27 866	12 454	40 436	5 065
Difference $\Sigma$ 2020-2010	15 854	-5 520	10 365	523	11 319	35 763	-9 798	26 081	3 110





# International Hop Growers' Convention

IHGC-Economic Committee: February 2020 - San Carlos de Bariloche, Argentina

Country:

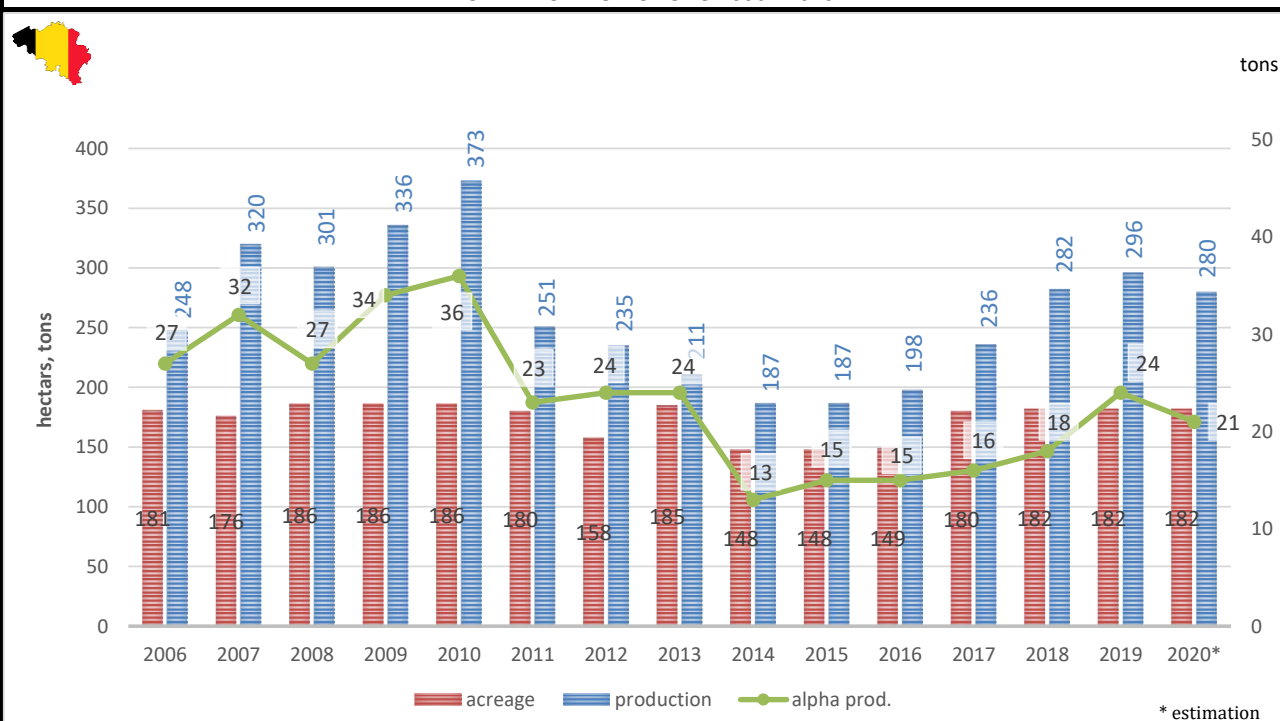
**Belgium**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N						

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

CHART OF HOP CROPS 2006 - 2020\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2020
O-Hop Area (Ha)	15,1	15,1
O-Production (MT)	20,00	20,00

### Main O-varieties

Golding Pilgrim Cascade  
WGV Challenger Fuggles

Country, Date:

Belgium

16.02.2020

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

**Joris Cambie**



# International Hop Growers' Convention

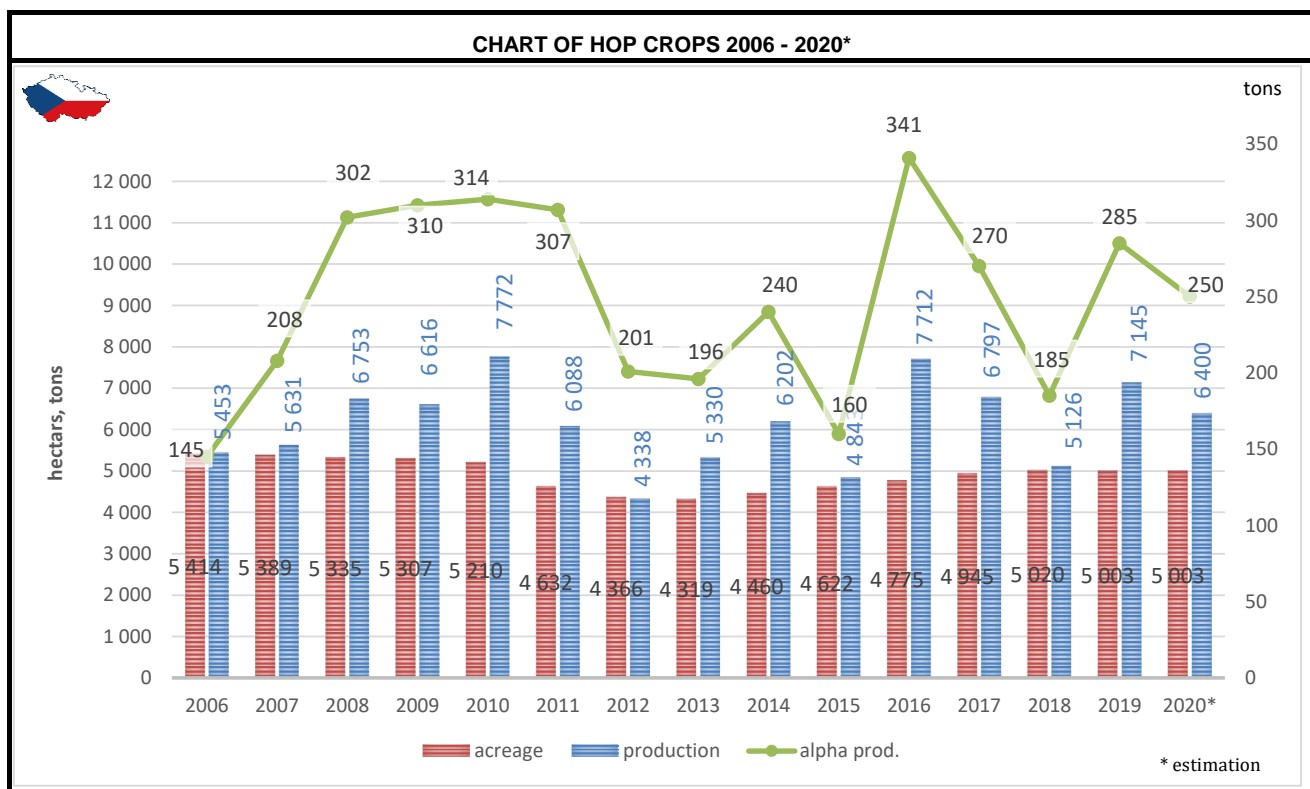
IHGC-Economic Committee: February 2020 - San Carlos de Bariloche, Argentina

Country: <b>Czech Republic</b>
-----------------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	100	100	100	90	85	70

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops	7,3	7,8			farmer price
Alpha Hops	5,0	5,2			farmer price
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2020
O-Hop Area (Ha)	10,55	10,55
O-Production (MT)	12,00	10,00

Main O-varieties  
Saaz  
Premiant

Country, Date:  
21.02.2020

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





# International Hop Growers' Convention

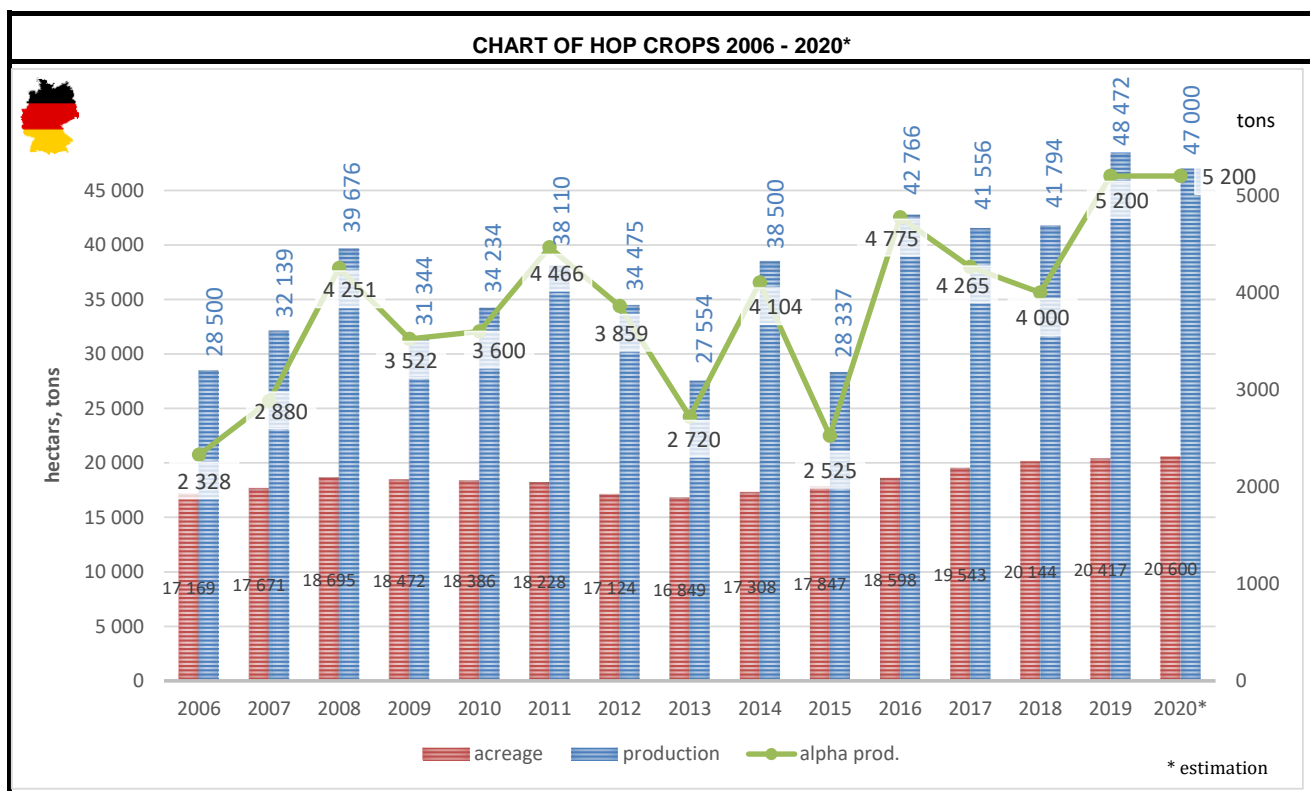
IHGC-Economic Committee: February 2020 - San Carlos de Bariloche, Argentina

Country: <b>Germany</b>
----------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
<b>Situation</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Metric tons	43 477	39 425	37 456	32 824	27 279	25 053
% Crop / Year N	93	84	80	70	58	53

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops		0,00	0,00	0,00
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>		unknown			
Aroma Hops	7,86				Farmer Price
Alpha Hops	7,59				Farmer Price
Average Price	7,77				Farmer Price
<b>Contract Prices</b>		unknown			
Aroma Hops	6,02				Farmer Price
Alpha Hops	4,84				Farmer Price
Average Price	5,37				Farmer Price
<b>Average Prices</b>		unknown			
Aroma Hops	6,23				Farmer Price
Alpha Hops	4,97				Farmer Price
<b>AVERAGE</b>	5,58				Farmer Price



COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS			
	Year N-1	Year N 2020	Main O-varieties HAT/PER/SSE
O-Hop Area (Ha)	140	170	
O-Production (MT)	190	230	

Country, Date:  
Germany

19.02.2020

Member Organization(s):  
gez. Brunner

# International Hop Growers' Convention

IHGC-Economic Committee: February 2020 - San Carlos de Bariloche, Argentina

Country:

**Poland**

Hop Area (Ha = Hectares)	Year N-1 2019	Year N 2020 (estimate)	Difference N - (N-1)	Difference %
Aroma	646	656	10	1,6
Alpha	1 016	1 026	10	1,0
Total	1 662	1 682	20	1,2

New Hop Area (Ha)	Year N-1 2019	Year N 2020 (estimate)
Aroma	10	
Alpha	10	
Total	20	

TOTAL Hop Area (Ha)	Year N-1 2019	Year N 2020 (estimate)	Difference N - (N-1)	Difference %
Aroma	656	656	0	0,0
Alpha	1 026	1 026	0	0,0
Total	1 682	1 682	0	0,0

Production MT=Metric Tons	Year N-1 2019	Year N 2020 (estimate)	Difference N - (N-1)	Difference %
Aroma	1 000	900	-100	-10,0
Alpha	1 900	1 700	-200	-10,5
Total	2 900	2 600	-300	-10,3

Yield MT/Ha	Year N-1 2019	Year N 2020 (estimate)	Difference %
Aroma	1,52	1,37	-10,0
Alpha	1,85	1,66	-10,5
Total	1,72	1,55	-10,4

Alpha Prod.	Year N-1	2019	Year N	2020	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	35	3,5				
Alpha	209	11,0				
Total	244	-				

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)
<b>Aroma</b>						
Marynka	315,5	315,5				
Lubelski	409,5	409,5				
Lomik	2,7	2,7				
Perle	44,1	44,1				
Sybilla	109,5	109,5				
H. Tradition	61,3	61,3				
Pulawski	6,5	6,5				
Triskel	1,4	1,4				
Saaz	2,5	2,5				
Cascade	11,4	11,4				
Centennial	0,7	0,7				
Crystal	0,1	0,1				
Tomyski	0,9	0,9				
Willamette	0,4	0,4				
<b>Alpha</b>						
Magnum	561,7	561,7				
Magnat	130,9	130,9				
Izabella	0,4	0,4				
Iunga	12,0	12,0				
Chinook	2,2	2,2				
Zula	1,2	1,2				
New varieties plants	1,0	1,0				
Taurus	3,7	3,7				
Oktawia	2,2	2,2				

# International Hop Growers' Convention

IHGC-Economic Committee: February 2020 - San Carlos de Bariloche, Argentina

Country:

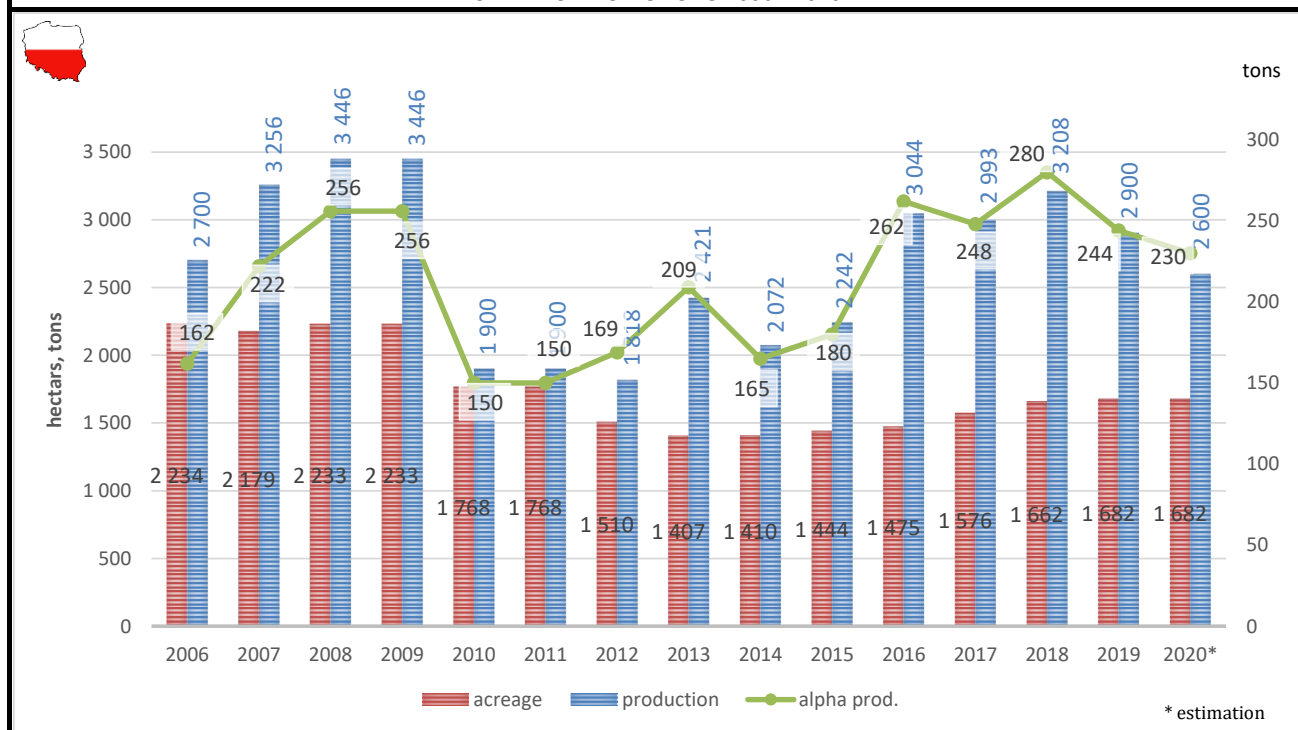
**Poland**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
<b>Situation</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Metric tons	2 000	2 000	1 000	1 000	1 000	
% Crop / Year N	67	67	33	33	33	

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops	4,65				Farmers Price
Alpha Hops	5,81				Farmers Price
Average Price	5,23				Farmers Price
<b>Contract Prices</b>					
Aroma Hops	4,65	4,65			Farmers Price
Alpha Hops	4,19	4,19			Farmers Price
Average Price	4,42	4,42			Farmers Price
<b>Average Prices</b>					
Aroma Hops	4,65				Farmers Price
Alpha Hops	5				Farmers Price
<b>AVERAGE</b>	4,83				Farmers Price

CHART OF HOP CROPS 2006 - 2020\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2020
O-Hop Area (Ha)	9,5	9,5
O-Production (MT)	11,0	11,0

### Main O-varieties

HMG            MAR            PUL  
MGN            CAS

Country, Date: Poland, 17. 2. 2020

Member Organization(s):  
Jan Szalas



# International Hop Growers' Convention

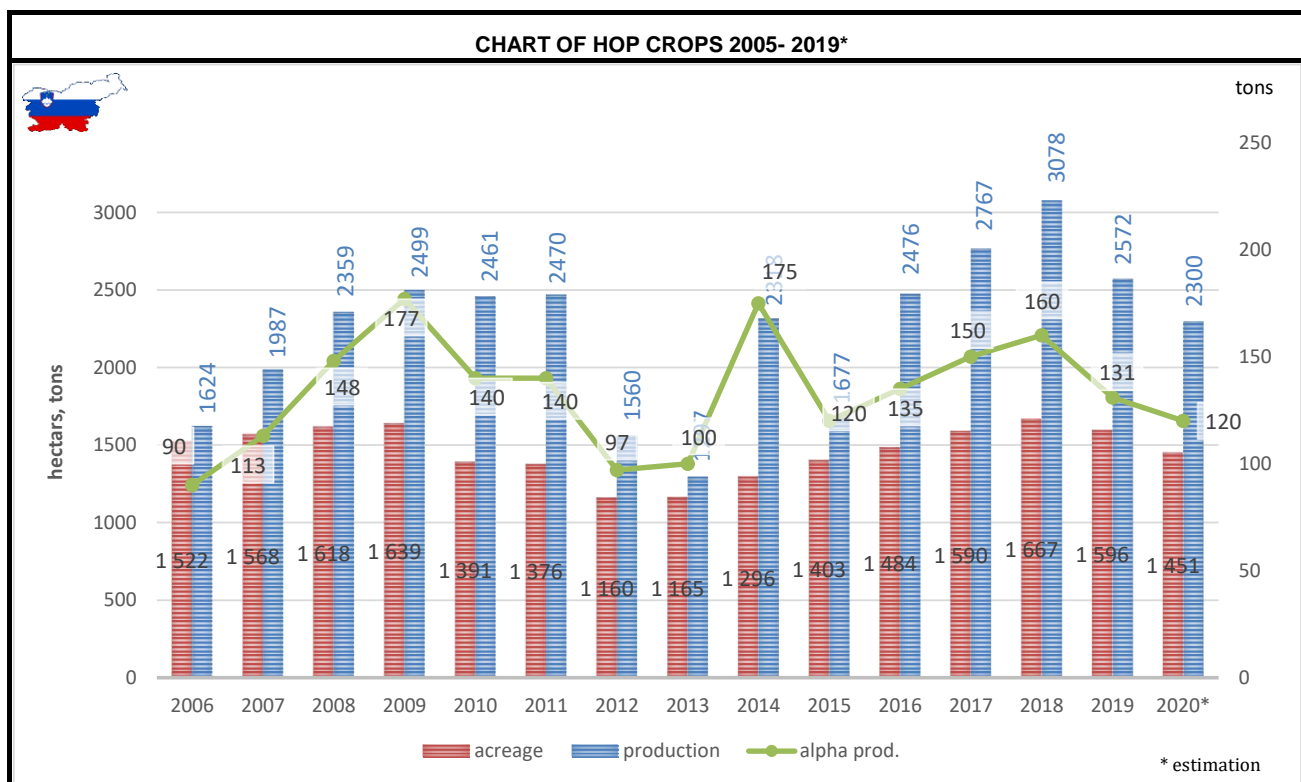
IHGC-Economic Committee: February 2020 - San Carlos de Bariloche, Argentina

Country: <b>Slovenia</b>
-----------------------------

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	90	80	75	70	N.A.	N.A.

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops	0			0
% unsold Hops	0			0

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>	7	7,5			Farmer Price
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

\*Hop area in 2020 compared with 2019 has reduced for 145 hectares due to eradication of infected hop field with viroid.  
 \*\*Hop growers will in season 2020 replant field where eradication of viroid with two years shift has been done. They are also establishing some new hop field. Figures of new hop area will be known in May.

	Year N-1	Year N 2020
O-Hop Area (Ha)	1	1
O-Production (MT)		

Main O-varieties  
Styrian Gold

Country, Date:  
Slovenia, February 17,2020

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



# International Hop Growers' Convention

IHGC-Economic Committee: February 2020 - San Carlos de Bariloche, Argentina

Country:

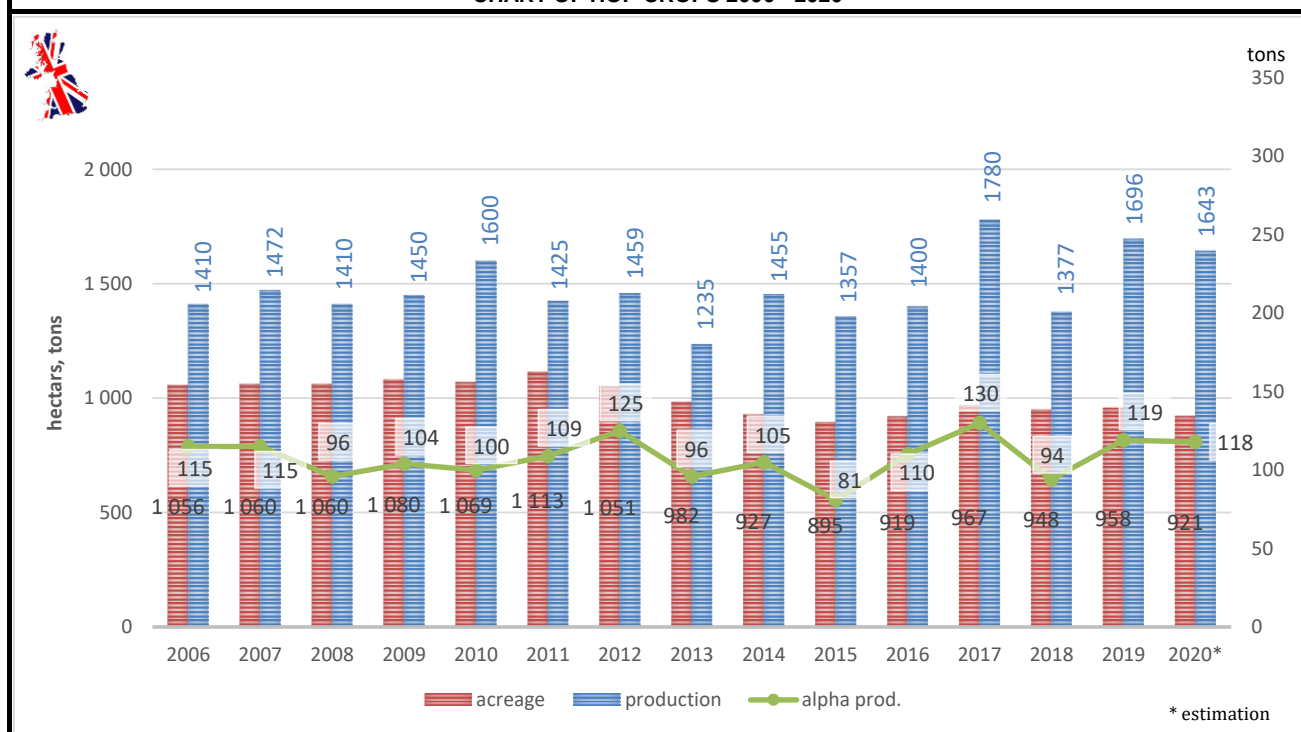
**UK**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	70	40	30	20	20	

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>					

CHART OF HOP CROPS 2006 - 2020\*



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

	Year N-1	Year N 2020
O-Hop Area (Ha)	4,6	5,6
O-Production (MT)	1,80	1,80

### Main O-varieties

Sovereign  
Merlin

Country, Date:  
UK 11/02/2020

Member Organization(s):  
**The British Hop Association**

# International Hop Growers' Convention

IHGC-Economic Committee: February 2020 - San Carlos de Bariloche, Argentina

Country:

**USA**

Hop Area (Ha = Hectares)	Year N-1 2019	Year N 2020 (estimate)	Difference N - (N-1)	Difference %
Aroma	18 005	18 300	295	1,6%
Alpha	5 842	5 900	58	1,0%
Total	23 847	24 200	353	1,5%

New Hop Area (Ha)	Year N-1 2019	Year N 2020 (estimate)		
Aroma				
Alpha				
Total				

TOTAL Hop Area (Ha)	Year N-1 2019	Year N 2020 (estimate)	Difference N - (N-1)	Difference %
Aroma	18 005	18 300	295	1,6%
Alpha	5 842	5 900	58	1,0%
Total	23 847	24 200	353	1,5%

Production MT=Metric Tons	Year N-1 2019	Year N 2020 (estimate)	Difference N - (N-1)	Difference %
Aroma	35 160	35 400	240	0,68%
Alpha	16 115	16 250	135	0,84%
Total	51 275	51 650	375	0,73%

Yield MT/Ha	Year N-1 2019	Year N 2020 (estimate)	Difference %
Aroma	1,95	1,93	-0,94%
Alpha	2,76	2,75	0,00%
Total	2,15	2,13	-0,74%

Alpha Prod.	Year N-1	2019	Year N	2020	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	5 755	11,2%				

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)
<b>Aroma</b>						
Amarillo®, VGXP01	874					
Azacca™, ADHA-483	238					
Cascade	2 137					
Centennial	1 468					
Chinook	958					
Citra®, HBC 394	3 656					
Cluster	188					
Ekuanot™, HBC 366	255					
El Dorado®	389					
Idaho 7™	157					
Mosaic® HBC 369	1 710					
Sabro™, HBC 438	274					
Simcoe®, YCR 14	1 766					
Other PNW Aroma	3 550					
Non-PNW Aroma	869					
<b>Total Aroma</b>	18 489					
<b>Alpha</b>						
Apollo™	238					
Bravo™	96					
CTZ	2 608					
Eureka!™	172					
Galena	166					
Hallertauer Magnum	31					
Nugget	475					
Pahto® HBC 682	839					
Summit™	434					
Super Galena™	223					
Other PNW Alpha	296					
Non-PNW Alpha	97					
<b>Total Alpha</b>	5 675					



# International Hop Growers' Convention

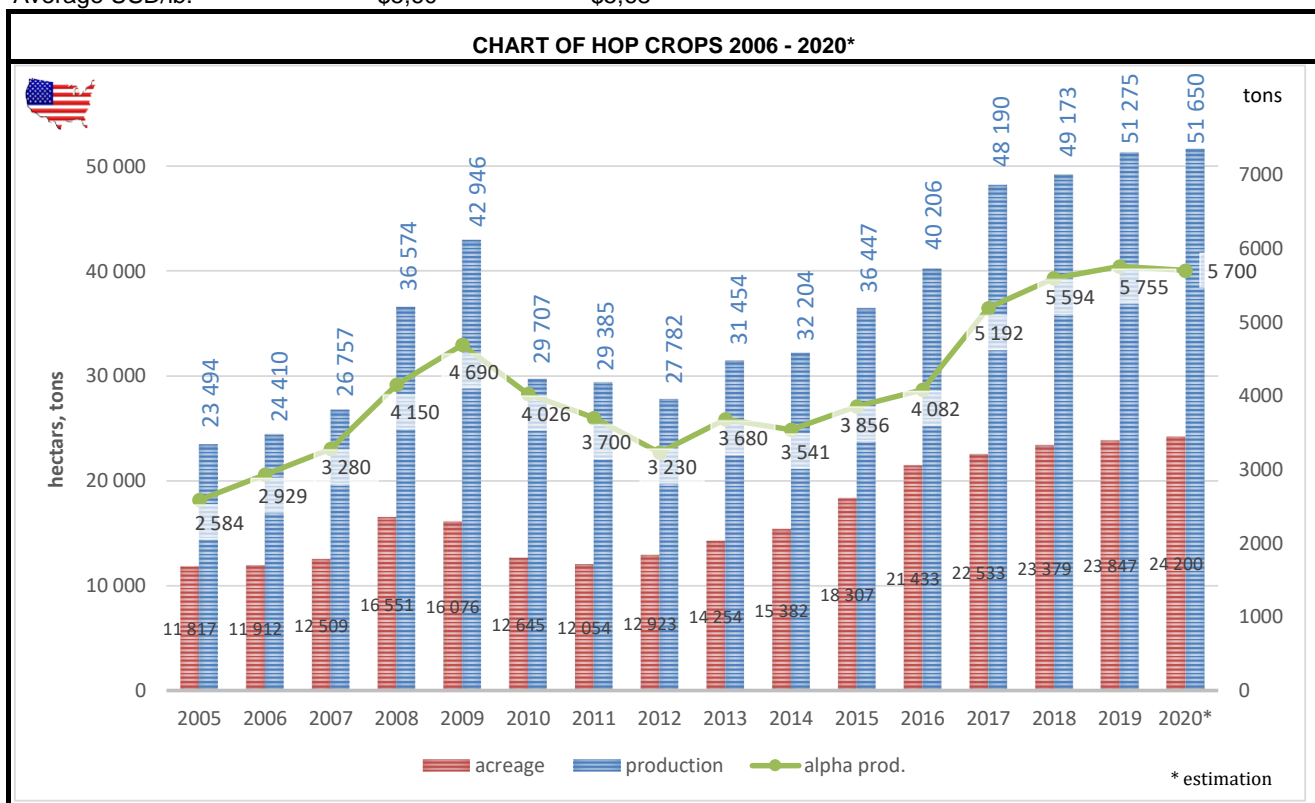
IHGC-Economic Committee: February 2020 - San Carlos de Bariloche, Argentina

Country:  
**USA**

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2020	2021	2022	2023	2024	2025
Metric tons						
% Crop / Year N	98%	95%	80%	60%	40%	25%

Unsold Hops (MT) : Crop Year (N-1)	2019	Aroma	Alpha	Total
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2018	Year (N-1) 2019	Year (N) 2020	% Diff. N vs. (N-1)	Kind of Price
<b>Spot Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Contract Prices</b>					
Aroma Hops					
Alpha Hops					
Average Price					
<b>Average Prices</b>					
Aroma Hops					
Alpha Hops					
<b>AVERAGE</b>	10.98 Euro/kg	11.52 Euro/kg			
Average USD/lb.	\$5,60	\$5,68			



## COMMENTS ON HOP PRODUCTION AND MARKET SITUATION / ORGANIC HOPS

Exchange rate \$1 USD = 0.92 Euro (15 Feb 2020). Alpha and aroma classifications are based on IHGC list of hop varieties. The USDA statistical reporting system is 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).

	Year N-1	Year N 2020
O-Hop Area (Ha)	174	239
O-Production (MT)	217	

27% increase

Main O-varieties

A total of 11 Pacific Northwest hop growers reported Organic hops

Country, Date:

II.20

Member Organization(s):  
Hop Growers of America