



2014

STATISTICAL REPORT

RELEASED JANUARY 2015

PRESENTED BY
HOP GROWERS OF AMERICA



TABLE OF CONTENTS

	Page
U.S. HOP ACREAGE BY STATE AND VARIETY (5 YEARS)	4-5
U.S. HOP YIELDS BY STATE AND VARIETY (5 YEARS)	6
<u>U.S. HOP PRODUCTION BY STATE AND VARIETY (5 YEARS)</u>	<u>7</u>
U.S. HOP ACREAGE BY STATE (10 YEARS)	8
U.S. AVERAGE HOP YIELDS (10 YEARS)	8
<u>U.S. HOPS: SEASON AVERAGE PRICE & TOTAL CROP VALUE</u>	<u>8</u>
2014 U.S. HOP INSPECTION REPORT	9
U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE (10 YEARS)	9
<u>IHGC AROMA ACREAGE (5 YEARS)</u>	<u>10</u>
IHGC ALPHA ACREAGE (5 YEARS)	10
IHGC TOTAL ACREAGE (5 YEARS)	11
<u>2014 IHGC HOP ACREAGE AND PRODUCTION</u>	<u>11</u>
U.S. & GERMAN ALPHA ACID PRODUCTION (10 YEARS)	12
CHART – WORLD ALPHA PRODUCTION & DEMAND (10 YEARS)	12
<u>CHART - COMPOSITION OF WORLD HOP ACREAGE 1992 VERSUS 2014</u>	<u>13</u>
CHART – WORLD’S LARGEST ALPHA PRODUCERS	13
CHART – MAJOR US HOP VARIETIES	14
<u>WORLD HOP ACREAGE & PERCENT SHARE (10 YEARS)</u>	<u>15</u>
WORLD HOP PRODUCTION & PERCENT SHARE (10 YEARS)	15
U.S. HOP IMPORTS BY COUNTRY (5 YEARS)	16
<u>U.S. HOP EXPORTS BY COUNTRY – TOP 40 (2009/10 – 2013/14)</u>	<u>17</u>
U.S. HOP EXPORTS BY PRODUCT 2013/14 – TOP 40	18
WORLD BEER PRODUCTION (FIVE YEARS)	19
<u>WORLD BEER PRODUCTION BY BREWERY (TOP 10) – 1988 VS. 2012/13</u>	<u>20</u>

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

Editor's Note: For 2014 the Hop Acreage chart on pages 4-5 has been enhanced to include 14 additional states. Data for Oregon, Washington and Idaho was provided by the USDA-NASS from annual grower surveys. Estimates for the remaining states were provided to Hop Growers of America by a network of growers, researchers, Extension specialists, brewers, and hop marketers. We will continue to expand and refine data collection for these and other new hop producing states in future years, including the addition of yield and production calculations. However, for 2014, the remaining reports in this publication are based only on NASS data collection for the Pacific Northwest.

Special thanks to members of the Great Lakes Hop Working Group for their assistance in estimating acreage for many of these additional states.

Report prepared by: Ann George for Hop Growers of America, Inc.
P.O. Box 1207, Moxee, WA. 98936, USA
Telephone (509) 453-4749 Fax: (509) 457-8561
E-mail: info@usahops.org Website: www.usahops.org

U.S. HOP ACREAGE BY STATE AND VARIETY (FIVE YEARS)

Note: Oregon, Washington and Idaho data is based on the USDA-NASS 2014 National Hop Report. Estimates for 14 additional states were compiled by Hop Growers of America (see Editor's Note on page 3). Pacific Northwest states harvested 38,011 acres, with other states contributing an estimated 880 acres (2% of US commercial hop acreage).

STATE & VARIETY	ACRES HARVESTED					2013-14
	2010	2011	2012	2013	2014	% +/-
CALIFORNIA	*	*	*	*	65	
COLORADO	*	*	*	*	94	
IDAHO						
Apollo	*	*	*	291	285	-2.06%
Bravo	*	*	*	136	126	-7.35%
Cascade	*	*	*	628	821	30.73%
Centennial	*	*	*	57	74	29.82%
Chinook	*	*	*	324	344	6.17%
Citra® (HBC 394)	*	*	*	19	91	378.95%
Crystal	*	*	*	*	29	
El Dorado®	*	*	*	14	63	350.00%
Simcoe® (YCR 14)	*	*	*	*	67	
Super Galena	*	*	*	275	161	-41.45%
Zeus	*	*	*	548	662	20.80%
Experimental	*	*	*	5	41	720.00%
Other Varieties ²	*	*	*	1059	979	-7.55%
TOTAL IDAHO¹	2,331	2,265	2,596	3,356	3,743	11.53%
ILLINOIS	*	*	*	*	10	
INDIANA	*	*	*	*	8	
MAINE	*	*	*	*	10	
MICHIGAN	*	*	*	*	300	
MINNESOTA	*	*	*	*	20	
NEBRASKA	*	*	*	*	12	
NEW YORK	*	*	*	*	150	
NORTH CAROLINA	*	*	*	*	30	
OHIO	*	*	*	*	30	
OREGON						
Cascade	122	263	346	423	961	127.19%
Centennial	*	*	208	249	443	77.91%
Fuggle	*	*	*	91	*	
Golding	*	*	*	194	234	20.62%
Liberty	*	108	83	*	*	
Magnum	*	64	58	104	176	69.23%
Mt. Hood	188	214	226	221	269	21.72%
Nugget	1,356	1,438	1,570	1,667	1,363	-18.24%
Perle	*	98	*	55	100	81.82%
Sterling	87	86	*	122	130	6.56%
Super Galena	134	241	175	204	125	-38.73%
Tettnanger	*	70	61	*	*	
Willamette	1,452	779	905	553	564	1.99%
Experimental	*	*	*	35	*	
Other Varieties ²	1,283	841	759	917	1,045	13.96%
TOTAL OREGON	4,622	4,202	4,391	4,835	5,410	11.89%
VERMONT	*	*	*	*	25	
VIRGINIA	*	*	*	*	25	

STATE & VARIETY	ACRES HARVESTED					2013-14
	2010	2011	2012	2013	2014	% +/-
WASHINGTON						
ADHA-483 Azacca™	*	*	*	*	79	
ADHA-881 Jarrylo™	*	*	*	*	75	
Ahtanum	*	*	176	211	194	-8.06%
Apollo	827	885	874	701	700	-0.14%
Bravo	414	593	528	493	584	18.46%
Cascade	1,728	2,108	2,380	4,237	4,837	14.16%
Centennial	357	641	1,478	1,869	2,836	51.74%
Chinook	443	572	1,215	1,415	1,297	-8.34%
Citra® (HBC 394)	113	239	538	1,296	1,670	28.86%
Cluster	392	482	546	802	728	-9.23%
Columbus/Tomahawk®	3,401	2,947	2,223	2,336	1,738	-25.60%
Crystal	*	*	154	214	181	-15.42%
El Dorado®	*	*	*	82	82	0.00%
Galena	1,920	1,415	954	440	306	-30.45%
Glacier	61	44	56	98	126	28.57%
Golding	*	*	*	105	94	-10.48%
Mosaic™ (HBC 369)	*	*	*	382	671	75.65%
Millennium	555	403	397	420	113	-73.10%
Mt. Hood	62	95	120	168	150	-10.71%
Northern Brewer	94	159	120	170	131	-22.94%
Nugget	829	861	875	395	265	-32.91%
Simcoe® (YCR 14)	237	495	940	1,298	1,819	40.14%
Summit™	*	2,477	*	2,844	2,522	-11.32%
Super Galena	886	990	959	771	606	-21.40%
Tettnanger	*	*	76	95	*	
Vanguard	*	*	59	76	58	-23.68%
Willamette	1,734	894	692	522	595	13.98%
YCR-4 - Palisade®	373	308	264	132	223	68.94%
YCR-5 - Warrior®	296	260	195	180	192	6.67%
Zeus	4,440	4,159	2,953	3,277	3,375	2.99%
Experimental	*	*	*	258	392	51.94%
Other Varieties ²	5,174	2,293	3,924	1,810	2,219	22.60%
TOTAL WASHINGTON	24,336	23,320	22,696	27,097	28,858	6.50%
WISCONSIN	*	*	*	*	120	
TOTAL UNITED STATES	31,289	29,787	29,683	35,288	38,910	10.26%

SOURCE: USDA-NASS and Hop Growers of America. Prepared by HGA.

¹ Prior to 2013, only State totals published for Idaho to avoid disclosure of individual operations.

² "Other Varieties" includes data to avoid disclosure of individual operations.

U.S. HOP YIELDS BY STATE AND VARIETY (FIVE YEARS)

STATE & VARIETY	YIELDS (POUNDS PER ACRE)					2013-14
	2010	2011	2012	2013	2014	% +/-
IDAHO						
Apollo	*	*	*	2,230	2,004	-10.13%
Bravo	*	*	*	2,430	2,579	6.13%
Cascade	*	*	*	1,224	1,746	42.65%
Centennial	*	*	*	1,004	754	-24.90%
Citra® (HBC 394)	*	*	*	1,011	1,200	18.69%
Chinook	*	*	*	1,801	1,673	-7.11%
Crystal	*	*	*	*	2,186	
El Dorado®	*	*	*	971	1,144	17.82%
Simcoe	*	*	*	*	969	
Super Galena	*	*	*	2,201	2,165	-1.64%
Zeus	*	*	*	3,049	2,891	-5.18%
Experimental	*	*	*	2,800	1,366	-51.21%
Other Varieties ²	*	*	*	1,063	1,354	27.38%
Total Idaho¹	2,129	2,408	1,745	1,740	1,847	6.15%
OREGON						
Cascade	1,680	1,616	1,802	1,483	1,402	-5.46%
Centennial	*	*	1,779	1,585	1,095	-30.91%
Fuggle	*	*	*	827	*	
Golding	*	*	*	1,148	955	-16.81%
Liberty	*	1,326	2,519	*	*	
Magnum	*	1,928	2,519	1,406	1,077	-23.40%
Mt. Hood	1,640	1,890	1,737	1,567	1,450	-7.47%
Nugget	2,119	2,317	1,897	2,053	1,978	-3.65%
Perle	*	1,622	*	1,178	1,057	-10.27%
Sterling	1,644	1,915	*	1,621	1,423	-12.21%
Super Galena	2,421	2,263	2,763	1,852	2,309	24.68%
Tettnanger	*	1,634	1,493	*	*	
Willamette	1,535	1,716	1,663	1,491	1,453	-2.55%
Experimental	*	*	*	1,734	*	
Other Varieties ²	1,711	1,511	1,253	1,931	1,426	-26.15%
Total Oregon	1,791	1,908	1,885	1,764	1,520	-13.83%
WASHINGTON						
ADHA-483 Azacca™	*	*	*	*	1,704	
ADHA-881 Jarrylo™	*	*	*	*	1,548	
Ahtanum	*	*	1,489	1,647	1,680	
Apollo	2,778	2,758	2,655	2,926	2,649	-9.47%
Bravo	2,566	2,609	2,647	2,860	2,768	-3.22%
Cascade	1,905	1,955	1,972	1,723	1,824	5.86%
Centennial	1,791	1,403	1,354	1,554	1,347	-13.32%
Chinook	1,963	1,718	1,699	1,987	1,815	-8.66%
Citra® (HBC 394)	1,930	1,812	1,342	1,405	1,570	11.74%
Cluster	2,060	2,019	1,965	1,948	1,825	-6.31%
Columbus/Tomahawk®	2,350	2,519	2,452	2,571	2,629	2.26%
Crystal	*	*	1,184	1,286	1,366	
El Dorado®	*	*	*	1,761	2,206	
Galena	1,810	1,821	1,742	1,969	1,801	-8.53%
Glacier	1,943	2,182	1,461	1,258	1,202	-4.45%
Golding	*	*	*	1,010	772	
Millennium	2,185	2,562	2,017	2,266	1,996	-11.92%
Mosaic™ (HBC 369)	*	*	*	1,709	2,225	
Mt. Hood	1,211	838	1,264	1,161	1,333	14.81%
Northern Brewer	1,270	1,698	1,443	1,256	1,244	-0.96%
Nugget	1,808	1,969	1,679	1,931	1,538	-20.35%
Simcoe® (YCR 14)	1,698	1,779	1,679	1,682	1,542	-8.32%
Summit™	*	2,705	*	1,873	2,105	12.39%
Super Galena	2,622	3,041	2,645	2,816	2,562	-9.02%
Tettnanger	*	*	1,003	755	*	
Vanguard	*	*	1,280	1,349	1,455	
Willamette	1,350	1,510	1,359	1,240	1,130	-8.87%
YCR-4 - Palisade®	2,431	2,562	2,356	2,790	2,469	-11.51%
YCR-5 - Warrior®	1,778	2,061	1,968	2,169	1,821	-16.04%
Zeus	2,678	2,572	2,565	2,940	2,811	-4.39%
Experimental	*	*	*	1,562	1,625	
Other Varieties ²	1,968	1,987	1,993	1,697	1,418	-16.44%
Total Washington	2,147	2,200	2,047	2,025	1,936	-4.40%
Total United States	2,093	2,175	1,985	1,962	1,868	-4.79%

SOURCE: USDA-NASS. Prepared by HGA.

¹ Prior to 2013, only State totals published for Idaho to avoid disclosure of individual operations.² "Other Varieties" includes data to avoid disclosure of individual operations.

U.S. HOP PRODUCTION BY STATE AND VARIETY (FIVE YEARS)

STATE & VARIETY	HOP PRODUCTION (POUNDS)					2013-14
	2010	2011	2012	2013	2014	% +/-
IDAHO						
Apollo	*	*	*	649,000	571,100	-12.00%
Bravo	*	*	*	330,500	324,900	-1.69%
Cascade	*	*	*	768,900	1,433,100	86.38%
Centennial	*	*	*	57,200	55,800	-2.45%
Citra® (HBC 394)	*	*	*	19,200	109,200	468.75%
Chinook	*	*	*	583,400	575,400	-1.37%
Crystal	*	*	*	*	63,400	
El Dorado®	*	*	*	13,600	72,100	430.15%
Simcoe® (YCR 14)	*	*	*	*	64,900	
Super Galena	*	*	*	605,400	348,500	-42.43%
Zeus	*	*	*	1,670,800	1,913,900	14.55%
Experimental	*	*	*	14,000	56,000	300.00%
Other Varieties ²	*	*	*	1,125,900	1,325,500	17.73%
Total Idaho¹	4,962,600	5,454,100	4,778,200	5,837,900	6,913,800	18.43%
OREGON						
Cascade	205,000	425,000	623,500	627,100	1,347,400	114.86%
Centennial	*	*	370,000	394,600	485,200	22.96%
Fuggle	*	*	*	75,300	*	
Golding	*	*	*	222,700	223,500	0.36%
Liberty	*	143,200	126,700	*	*	
Magnum	*	123,400	146,100	146,200	189,600	29.69%
Mt. Hood	308,300	404,500	392,600	346,200	390,000	12.65%
Nugget	2,873,200	3,332,100	2,978,000	3,422,000	2,696,400	-21.20%
Perle	*	159,000	*	64,800	105,700	63.12%
Sterling	143,000	164,700	*	197,800	185,000	-6.47%
Super Galena	324,400	545,500	483,600	377,800	288,600	-23.61%
Tettnanger	*	114,400	91,100	*	*	
Willamette	2,228,300	1,337,000	1,504,700	824,700	819,500	-0.63%
Experimental	*	*	*	60,700	*	
Other Varieties ²	2,195,400	1,270,600	951,300	1,770,600	1,490,100	-15.84%
Total Oregon	8,277,600	8,019,400	7,667,600	8,530,500	8,221,000	-3.63%
WASHINGTON						
ADHA-483 Azacca™	*	*	*	*	134,600	
ADHA-881 Jarrylo™	*	*	*	*	116,100	
Ahtanum	*	*	262,000	347,500	326,000	-6.19%
Apollo	2,297,400	2,440,400	2,320,600	2,051,400	1,854,300	-9.61%
Bravo	1,062,300	1,547,200	1,397,400	1,409,900	1,616,700	14.67%
Cascade	3,291,800	4,121,300	4,693,000	7,300,000	8,821,000	20.84%
Centennial	639,400	899,400	2,001,000	2,905,200	3,818,800	31.45%
Chinook	869,600	982,800	2,064,200	2,812,300	2,354,300	-16.29%
Citra® (HBC 394)	218,100	433,100	721,900	1,820,300	2,622,500	44.07%
Cluster	807,500	973,300	1,073,000	1,562,000	1,328,600	-14.94%
Columbus/Tomahawk®	7,992,400	7,422,400	5,451,700	6,006,100	4,569,200	-23.92%
Crystal	*	*	182,300	275,300	247,200	-10.21%
El Dorado®	*	*	*	144,400	180,900	25.28%
Galena	3,475,200	2,576,200	1,662,000	866,300	551,000	-36.40%
Glacier	118,500	96,000	81,800	123,300	151,500	22.87%
Golding	*	*	*	106,000	72,600	-31.51%
Millennium	1,212,700	1,032,400	800,800	951,600	225,600	-76.29%
Mosaic™ (HBC 369)	*	*	*	652,800	1,493,200	128.74%
Mt. Hood	75,100	79,600	151,700	195,000	199,900	2.51%
Northern Brewer	119,400	270,000	173,100	213,500	163,000	-23.65%
Nugget	1,498,800	1,695,100	1,468,700	762,800	419,500	-45.01%
Simcoe® (YCR 14)	402,400	880,800	1,578,000	2,183,400	2,805,800	28.51%
Summit™	*	6,702,506	*	5,326,600	5,308,300	-0.34%
Super Galena	2,323,100	3,010,600	2,536,400	2,171,500	1,552,400	-28.51%
Tettnanger	*	*	76,200	71,700	*	
Vanguard	*	*	75,500	102,500	84,400	-17.66%
Willamette	2,340,900	1,350,000	940,400	647,100	672,500	3.93%
YCR-4 - Palisade®	906,800	789,100	622,100	368,300	550,600	49.50%
YCR-5 - Warrior®	526,300	535,900	383,800	390,400	349,700	-10.43%
Zeus	11,890,300	10,695,900	7,575,900	9,635,700	9,488,400	-1.53%
Experimental	*	*	*	402,900	637,000	58.10%
Other Varieties ²	10,184,400	2,774,094	8,172,100	3,071,900	3,145,500	2.40%
Total Washington	52,252,400	51,308,100	46,465,600	54,877,700	55,861,100	1.79%
Total United States³	65,492,600	64,781,600	58,911,400	69,246,100	70,995,900	2.53%

SOURCE: USDA-NASS. Prepared by HGA.

¹ Prior to 2013, only State totals published for Idaho to avoid disclosure of individual operations.² "Other Varieties" includes data to avoid disclosure of individual operations.

www.usahops.org

U.S. HOP ACREAGE BY STATE (10 YEARS - IN ACRES)

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
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	28,924	5,764	4,030	39,726
2010	24,336	4,622	2,331	31,289
2011	23,320	4,202	2,265	29,787
2012	22,696	4,391	2,596	29,683
2013	27,097	4,835	3,356	35,288
2014	28,858	5,410	3,743	38,011

SOURCE: USDA-NASS. Prepared by HGA.

U.S. AVERAGE HOP YIELD (TEN YEARS)

YEAR	POUNDS PER ACRE			
	WASHINGTON	OREGON	IDAHO	TOTAL U.S.
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
2010	2,147	1,791	2,129	2,093
2011	2,200	1,908	2,408	2,175
2012	2,047	1,746	1,841	1,985
2013	2,025	1,764	1,740	1,962
2014	1,936	1,520	1,847	1,868

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)
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	\$3.54	\$3.63	\$3.75	\$3.57	94,678	\$337,874
2010	\$3.11	\$3.96	\$3.89	\$3.28	65,493	\$214,589
2011	\$3.06	\$3.79	\$2.93	\$3.14	64,782	\$203,378
2012	\$3.10	\$3.91	\$2.69	\$3.17	58,911	\$186,876
2013	\$3.37	\$3.76	\$2.62	\$3.35	69,246	\$232,308
2014	\$3.89	\$4.34	\$2.75	\$3.83	70,996	\$271,992

SOURCE: USDA-NASS. Prepared by HGA.

2014 HOP INSPECTION REPORT

YEAR	WASHINGTON	OREGON	IDAHO	TOTAL
2010	259,380	41,384	24,000	324,764
2011	254,385	40,093	27,251	321,729
2012	236,025	39,233	19,312	294,570
2013	266,356	35,388	28,412	330,156
2014	271,891	38,592	34,137	344,620

	0%	1%	2%	3%	4%	5%	6%	7%	TOTAL	AVERAGE
WA	194,112	69,326	7,608	783	7	55	-	-	271,891	0.32%
OR	32,569	5,223	781	19	-	-	-	-	38,592	0.18%
ID	26,535	6,420	589	121	472	-	-	-	34,137	*
Total	253,216	80,969	8,978	923	479	55	-	-	344,620	0.30%
% of Total	73%	23%	3%	0%	0%	0%	0%	0%	100%	
* South ID average L&S 0.09%, North ID average L&S 1.11%										

	0%	1%	2%	3%	4%	5%	6%	7+%	TOTAL	AVERAGE
WA	186,684	60,339	15,133	5,610	2,058	1,073	247	747	271,891	0.47%
OR	20,734	4,662	4,027	2,853	1,710	1,155	1,621	1,830	38,592	1.46%
ID	26,208	1,790	460	278	296	774	1,768	2,563	34,137	*
Total	233,626	66,791	19,620	278	4,064	3,002	3,636	5,140	344,620	0.64%
% of Total	68%	19%	6%	3%	1%	1%	1%	1%	100%	
* South ID average Seed 0.05%, North ID average Seed 5.41%										

U.S. HOP LEAF, STEM & SEED CONTENT PERCENTAGE (10 YEARS)

Year	WASHINGTON Leaf & Stem	OREGON Leaf & Stem	IDAHO Leaf & Stem	U.S. AVERAGE %	
				Leaf & Stem	Seed Content
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
2010	0.17	0.15	0.04	0.16	1.31
2011	0.14	0.09	0.02	0.12	1.34
2012	0.33	0.16	0.05	0.29	0.66
2013	0.28	0.34	0.23	0.28	0.68
2014	0.32	0.18	0.09%/1.11%*	0.30	0.64
*See table 2					

SOURCE: State Hop Inspection Labs. Prepared by HGA.

IHGC AROMA ACREAGE (FIVE YEARS)

COUNTRY	AROMA ACREAGE (IN ACRES)					2013-14
	2010	2011	2012	2013	2014	% +/-
Australia	79	119	128	158	158	0.00%
Austria	460	479	477	462	470	1.60%
Belgium	126	148	175	173	190	10.00%
China	1,433	946	853	494	494	0.00%
Czech Rep.	12,215	10,791	10,413	10,045	9,902	-1.43%
France	983	892	922	741	808	9.00%
Germany	23,844	23,569	22,489	21,733	22,732	4.59%
New Zealand	568	655	655	712	712	0.00%
Poland	1,008	1,008	988	1,132	1,240	9.61%
Romania	158	151	151	151	156	3.28%
Russia	855	208	208	208	208	0.00%
Serbia	84	84	84	84	84	0.00%
Slovakia	566	549	529	430	341	-20.69%
Slovenia	3,210	3,168	2,634	2,535	2,728	7.60%
South Africa	0	0	0	0	0	0.00%
Spain	0	0	0	0	0	0.00%
Ukraine	1,663	1,268	853	932	764	-18.04%
UK - England	2,019	1,984	1,965	1,965	1,700	-13.46%
USA	10,811	11,921	15,558	19,996	24,712	23.58%
IHGC Total	60,082	57,940	59,082	61,950	67,398	8.79%

SOURCE: IHGC Economic Commission November report and USDA NASS December National Hop Report.
Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC ALPHA ACREAGE (FIVE YEARS)

COUNTRY	ALPHA ACREAGE (IN ACRES)					2013-14
	2010	2011	2012	2013	2014	% +/-
Australia	1,028	1,006	988	951	850	-10.65%
Austria	79	94	94	106	133	25.58%
Belgium	334	297	215	217	175	-19.32%
China	12,889	10,070	9,108	6,919	5,684	-17.86%
Czech Rep.	183	161	151	133	116	-12.96%
France	111	156	163	146	131	-10.17%
Germany	20,906	20,248	18,397	17,162	17,051	-0.65%
New Zealand	371	284	247	222	203	-8.89%
Poland	3,361	3,361	2,471	2,093	1,960	-6.38%
Romania	425	428	445	445	450	1.11%
Russia	183	133	133	133	133	0.00%
Serbia	82	82	82	82	82	0.00%
Slovakia	0	0	0	0	0	0.00%
Slovenia	138	178	91	86	89	2.86%
South Africa	1,216	1,216	1,216	1,216	1,038	-14.63%
Spain	1,211	1,260	1,260	1,194	1,285	7.66%
Ukraine	588	297	208	203	148	-26.83%
UK - England	623	766	633	633	549	-13.28%
USA	20,436	17,866	15,249	15,227	13,299	-12.66%
IHGC Total	64,162	57,900	51,152	47,168	43,375	-8.04%

SOURCE: IHGC Economic Commission November report and USDA NASS December National Hop Report. Prepared by HGA.
Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC TOTAL ACREAGE (FIVE YEARS)

COUNTRY	TOTAL ACREAGE (IN ACRES)					2013-14
	2010	2011	2012	2013	2014	% +/-
Australia	1,107	1,124	1,117	1,110	1,008	-9.13%
Austria	536	573	571	568	603	6.09%
Belgium	460	445	390	390	366	-6.33%
China	14,322	11,016	9,961	7,413	6,178	-16.67%
Czech Rep.	12,398	10,952	10,564	10,178	10,018	-1.58%
France	1,095	1,048	1,085	887	939	5.85%
Germany	44,749	43,818	40,887	38,895	39,782	2.28%
New Zealand	939	939	902	934	914	-2.12%
Poland	4,369	4,369	3,460	3,225	3,200	-0.77%
Romania	583	578	596	596	605	1.66%
Russia	1,038	341	341	341	341	0.00%
Serbia	166	166	166	166	166	0.00%
Slovakia	566	549	529	430	341	-20.69%
Slovenia	3,348	3,346	2,726	2,622	2,817	7.45%
South Africa	1,216	1,216	1,216	1,216	1,038	-14.63%
Spain	1,211	1,260	1,260	1,194	1,285	7.66%
Ukraine	2,251	1,564	1,060	1,134	912	-19.61%
UK - England	2,642	2,750	2,597	2,597	2,249	-13.42%
USA	31,247	29,787	30,807	35,223	38,011	7.92%
IHGC Total	124,242	115,840	110,233	109,119	110,773	1.52%

SOURCE: IHGC Economic Commission November report and USDA NASS December National Hop Report. Excludes new acreage (not harvested). Numbers may not total exactly due to rounding and standard/metric conversions.

IHGC HOP ACREAGE AND PRODUCTION 2014

COUNTRY	HOP ACREAGE (acres)				HOP PRODUCTION (pounds)			
	AROMA	ALPHA	NEW	TOTAL	AROMA	ALPHA	TOTAL	Alpha MT.
Australia	158	1,008	0	1,166	440,920	1,937,843	2,378,763	140
Austria	470	133	7	610	848,771	231,483	1,080,254	40
Belgium	190	175	17	383	216,051	291,007	507,058	18
China	494	5,684	0	6,178	661,380	12,566,220	13,227,600	380
Czech Rep.	9,902	116	1,003	11,021	12,808,726	198,414	13,007,140	220
France	808	131	146	1,085	1,307,328	233,688	1,541,015	24
Germany	22,732	17,051	2,988	42,770	42,769,240	41,887,400	84,656,640	4,100
New Zealand	712	203	0	914	1,294,100	392,419	1,686,519	74
Poland	1,240	1,960	269	3,469	1,748,248	3,589,089	5,337,337	209
Romania	156	450	0	605	125,662	291,007	416,669	18
Russia	208	133	49	390	202,823	154,322	357,145	9
Serbia	84	82	30	195	127,867	167,550	295,416	11
Slovakia	341	0	0	341	330,690	0	330,690	7
Slovenia	2,728	89	388	3,205	4,955,941	154,322	5,110,263	140
South Africa	0	1,038	0	1,038	0	1,807,772	1,807,772	108
Spain	0	1,285	91	1,376	0	2,116,416	2,116,416	118
Ukraine	764	148	0	912	881,840	176,368	1,058,208	30
UK - England	1,700	549	0	2,249	1,543,220	661,380	2,204,600	85
USA	24,712	13,299	0	38,011	38,728,208	32,268,730	70,996,938	3,630
IHGC Total	67,398	43,533	4,989	115,920	108,991,015	99,125,430	208,116,445	9,361

SOURCE: IHGC Economic Commission November report and USDA NASS December National Hop Report. 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.

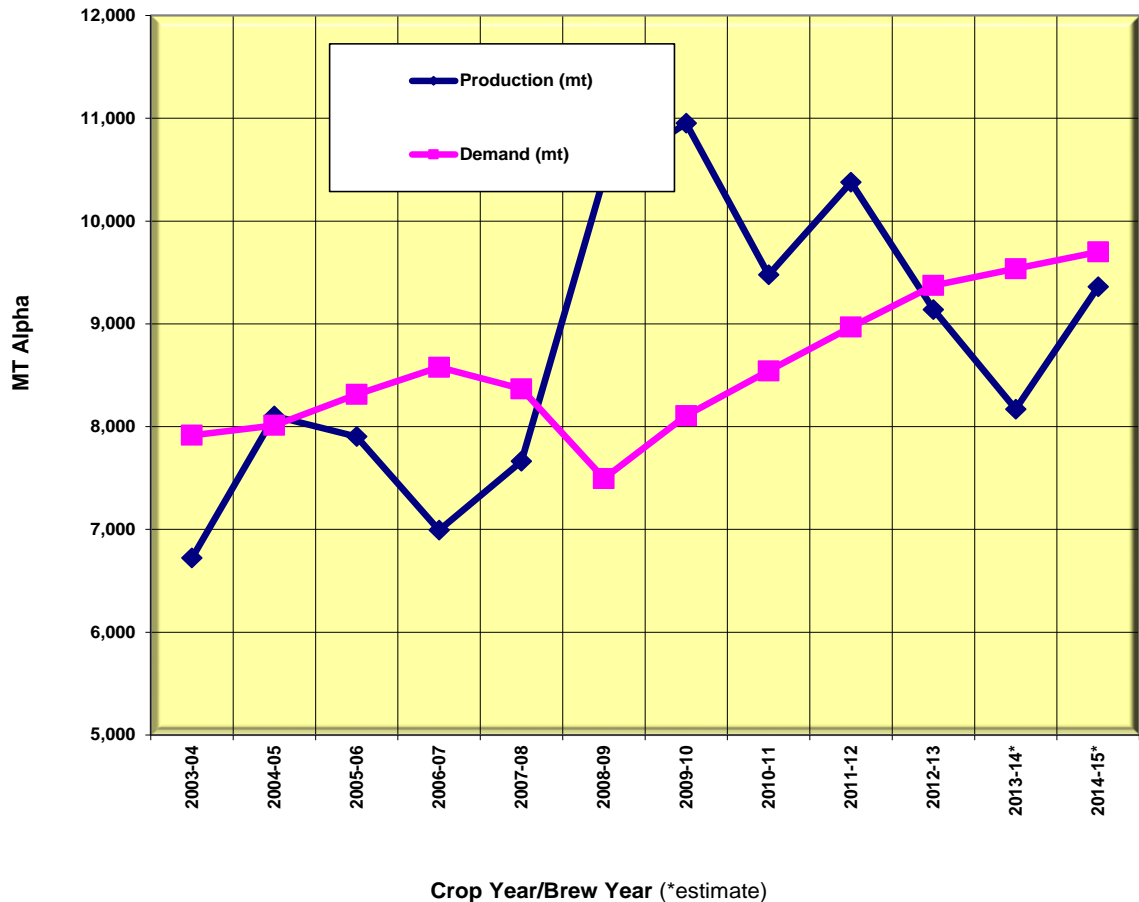
U.S. & GERMAN ALPHA ACID PRODUCTION (10 YEARS)

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 %*
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%
2010	64,954	29,463	3,517	11.9%	75,177	34,100	3,600	10.6%
2011	64,992	29,480	4,308	14.6%	82,673	37,500	4,400	11.7%
2012	61,249	27,782	3,500	12.6%	76,059	34,500	3,850	11.2%
2013	69,343	31,454	3,680	11.7%	60,746	27,554	2,680	9.7%
2014	70,997	32,204	3,630	11.3%	74,956	38,400	4,100	10.7%

SOURCE: US figures from USDA NASS 2014 National Hop Report. German figures from IHGC November Economic Commission report. Prepared by HGA.

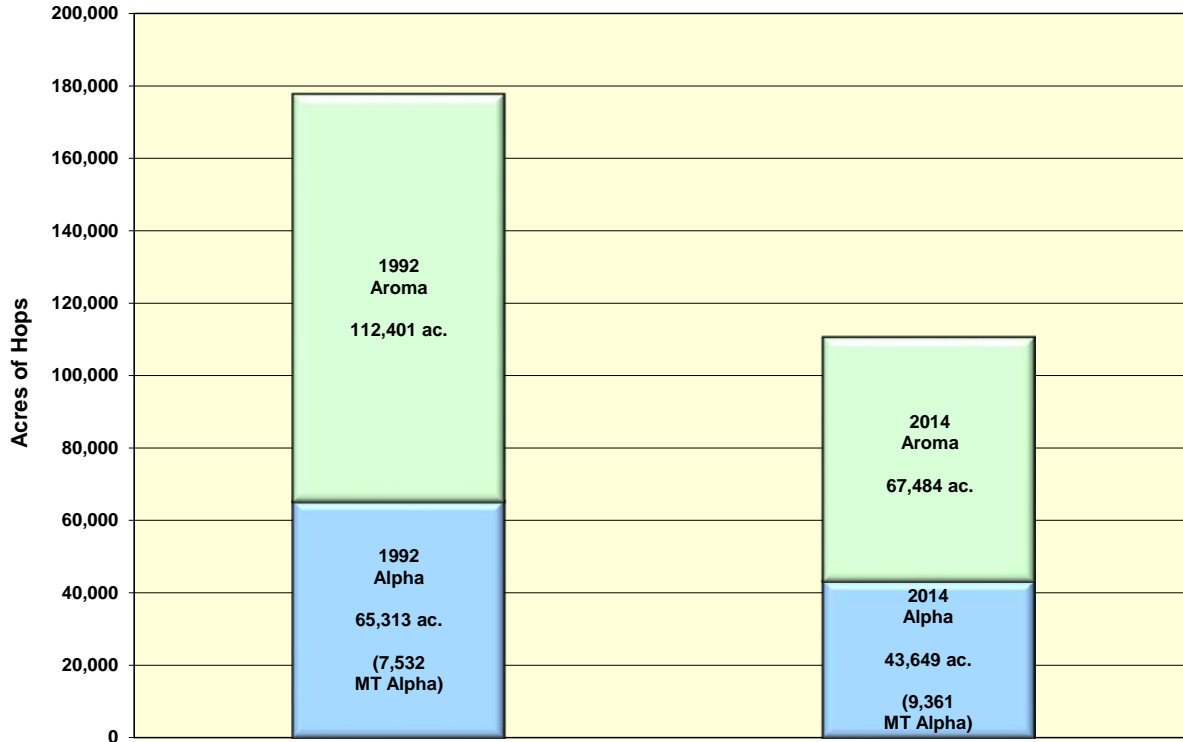
*Figures presented in the chart are the result of dividing the estimated MT Alpha by MT Hops for each year. This does not represent an estimate based on any type of analytical procedure.

WORLD ALPHA PRODUCTION & DEMAND 2002/03 – 2014/15



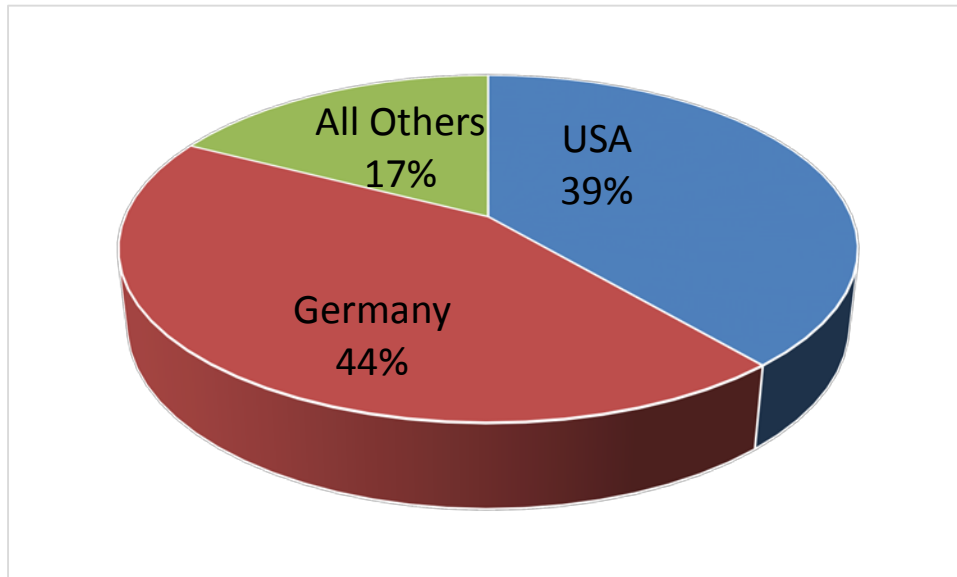
SOURCE: Barth Report. 2014-15 estimates from November 2014 IHGC Market Report (merchants). Prepared by HGA.

COMPOSITION OF WORLD HOP ACREAGE - 1992 VERSUS 2014



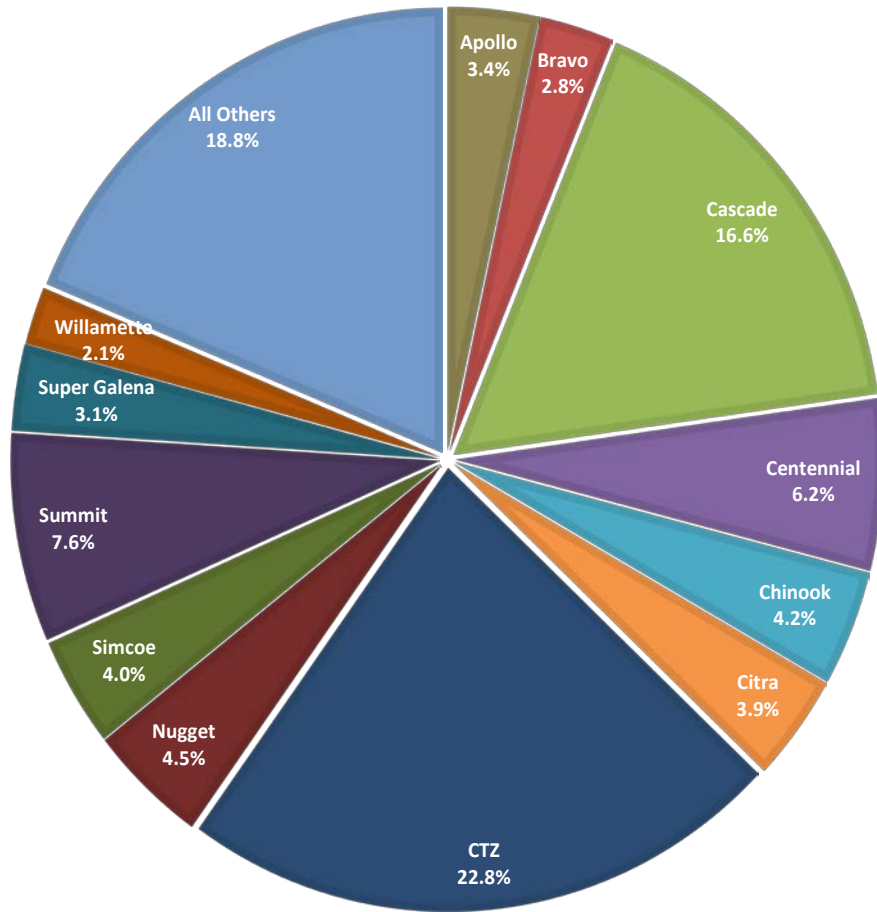
SOURCE: IHGC November Report and USDA NASS December National Hop Report. Prepared by HGA.

WORLD'S LARGEST ALPHA PRODUCERS - 2014



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

MAJOR US HOP VARIETIES – 2014 (% of US Production)



SOURCE: USDA-NASS. Prepared by HGA.

WORLD HOP ACREAGE & PERCENT SHARE (acres)

COUNTRY	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Germany	42,404	41,247	41,376	43,269	43,902	44,749	43,818	40,887	41,636	42,770
	34%	36%	34%	33%	33%	36%	37%	37%	37%	37%
UK-England	2,932	2,609	2,619	2,718	2,669	2,669	2,570	2,597	2,427	2,249
	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%
Czech Rep.	14,010	13,109	12,832	12,664	12,479	12,398	10,952	10,564	10,673	11,021
	11%	12%	11%	10%	9%	10%	9%	10%	9%	10%
Europe (rest)	20,236	19,253	17,313	17,236	16,222	16,186	13,178	11,842	11,897	12,183
	16%	17%	14%	13%	12%	13%	11%	11%	11%	11%
USA	29,188	29,435	30,911	39,263	40,126	31,247	30,016	30,807	35,223	38,011
	24%	26%	25%	29%	30%	25%	25%	28%	31%	33%
China	11,846	4,910	13,912	14,322	14,322	14,322	14,322	9,961	7,413	6,178
	10%	4%	11%	11%	11%	11%	12%	9%	7%	5%
World (rest)	3,354	2,853	3,047	3,633	3,991	3,941	3,620	3,575	3,650	3,508
	3%	3%	2%	3%	3%	3%	3%	3%	3%	3%
World Totals	123,609	113,417	122,010	133,105	133,711	125,512	118,476	110,233	112,919	115,920
Europe (rest): Austria, Belgium, France, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Ukraine										
World (rest): Australia, New Zealand, Russia, South Africa										

SOURCE: IHGC Economic Commission November 2014 report. Prepared by HGA.

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

COUNTRY	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Germany	75,397	62,831	70,854	87,104	68,894	75,177	82,673	76,059	60,746	84,657
	37%	35%	35%	36%	28%	34%	38%	39%	34%	41%
England	3,732	3,109	3,108	2,976	3,197	3,197	3,351	3,217	2,723	2,205
	2%	2%	2%	1%	1%	1%	2%	2%	2%	1%
Czech	15,238	11,530	12,414	14,771	14,109	16,204	13,779	9,480	11,750	13,007
	8%	6%	6%	6%	6%	7%	6%	5%	7%	6%
Europe (rest)	24,960	21,312	20,891	23,115	22,780	21,398	17,077	14,777	14,202	17,791
	12%	12%	10%	9%	9%	10%	8%	7%	8%	9%
USA	51,796	53,815	58,989	76,235	91,491	64,954	64,992	61,316	69,343	70,997
	26%	30%	29%	31%	38%	29%	30%	31%	39%	34%
China	23,315	20,944	29,762	35,494	35,494	35,494	29,982	26,334	13,228	13,228
	12%	12%	15%	14%	15%	16%	14%	13%	7%	6%
World (rest)	6,682	5,227	5,489	5,324	6,927	7,068	5,939	6,309	6,446	6,231
	3%	3%	3%	2%	3%	3%	3%	3%	4%	3%
World Totals	201,122	178,768	201,507	245,019	242,892	223,492	217,793	197,492	178,438	208,116

SOURCE: IHGC Economic Commission November 2014 report. Prepared by HGA.

U.S. IMPORTS OF HOPS (FIVE YEARS)*(In pounds; extract converted at 4:1 ratio)*

2013/14 Rank	Country	2009/10	2010/11	2011/12	2012/13	2013/14
1	Germany	4,753,166	4,673,359	4,483,541	5,402,868	4,767,055
2	United Kingdom	792,782	858,700	1,008,174	1,328,065	1,125,019
3	Australia	569,013	372,802	720,250	634,490	1,105,839
4	New Zealand	369,274	559,533	668,221	333,780	933,878
5	China	13,669	1,764	0	544,983	829,820
6	Czech Republic	162,481	76,721	136,246	283,735	223,549
7	Slovenia	397,493	102,956	95,019	113,097	171,520
8	France	202,384	16,535	45,636	23,810	159,394
9	Italy	0	882	8,818	2,205	26,015
10	Spain	0	0	0	0	20,283
11	Poland	9,700	1,984	12,346	11,684	7,496
12	South Africa	0	0	0	882	3,527
13	Peru	0	0	0	0	3,086
14	Belgium-Luxembourg	9,700	16,755	0	0	882
15	Switzerland	0	8,818	0	4,409	0
16	Vietnam	0	0	0	0	0
17	Canada	0	1,764	78,925	14,991	0
18	India	0	0	0	0	0
19	Japan	0	0	0	0	0
20	Israel	882	0	0	0	0
21	Thailand	0	0	0	0	0
22	Hong Kong	0	0	0	0	0
23	Venezuela	0	0	0	0	0
24	Somalia	1,543	0	0	0	0
25	Ethiopia	0	2,425	4,409	2,205	0
26	Argentina	0	882	1,102	1,764	0
	Grand Total	7,282,089	6,695,879	7,262,688	8,702,968	9,377,362

Source: USDA Foreign Agricultural Service - Global Agricultural Trade System, <http://www.fas.usda.gov/gats/default.aspx>.
Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS, TOP 40 COUNTRIES (2009/10 through 2013/14)*(In pounds; extract is converted to fresh hop equivalent at a ratio of 4:1)*

2013/14 Rank	Country	2009/10 (Sep-Aug)	2010/11 (Sep-Aug)	2011/12 (Sep-Aug)	2012/13 (Sep-Aug)	2013/14 (Sep-Aug)
1	United Kingdom	6,214,610	6,928,247	6,799,717	7,172,078	8,261,823
2	Mexico	8,070,903	8,553,274	5,096,867	9,036,307	6,619,159
3	Belgium-Luxembourg	8,637,931	8,307,238	5,503,179	4,627,723	4,897,348
4	Brazil	5,345,769	3,950,684	4,755,591	4,056,505	3,976,037
5	China	4,039,089	3,205,080	2,223,803	2,862,702	3,603,455
6	Germany	5,988,196	4,161,005	5,560,940	5,130,157	2,918,700
7	Colombia	3,252,039	3,212,576	2,243,424	2,223,362	2,520,986
8	Canada	4,071,497	2,036,410	1,950,430	1,788,390	2,436,549
9	Venezuela	718,927	1,682,788	1,224,888	2,886,292	1,950,650
10	Korea, South	1,738,124	1,541,693	1,253,989	1,173,961	1,644,869
11	Japan	2,440,958	2,785,320	1,626,130	1,815,948	1,603,642
12	Hong Kong	1,319,026	2,119,083	1,441,823	1,046,755	1,297,200
13	Australia	1,507,521	917,784	1,342,174	1,070,344	1,055,573
14	Dominican Republic	591,280	868,621	762,138	766,547	890,006
15	Argentina	947,326	1,231,282	1,091,950	985,907	886,479
16	Peru	1,144,199	1,075,194	1,075,635	949,751	711,432
17	Ecuador	1,089,745	466,719	442,688	398,596	523,377
18	Thailand	578,052	444,672	428,799	168,433	466,057
19	Chile	503,977	635,593	614,428	741,855	462,530
20	Russia	1,205,708	589,296	488,544	416,012	445,554
21	Vietnam	1,027,354	963,200	553,581	385,368	377,431
22	South Africa	426,815	578,713	506,843	427,035	369,495
23	Philippines	1,399,715	836,654	679,244	600,760	363,101
24	Netherlands	231,044	71,650	366,188	102,294	294,317
25	India	879,644	523,377	158,953	395,950	219,801
26	Indonesia	26,676	54,675	166,669	213,407	198,416
27	Guatemala	386,691	463,853	316,804	287,262	166,229
28	Bolivia	208,998	195,330	80,248	153,221	162,040
29	Panama	83,555	266,539	188,495	71,209	161,158
30	France	145,946	95,019	222,446	121,034	159,174
31	Trinidad and Tobago	46,738	100,531	74,957	54,675	149,032
32	Kenya	115,302	37,920	66,800	0	132,057
33	Nigeria	642,868	435,633	640,222	258,382	113,759
34	Malaysia	268,964	502,874	114,640	135,805	110,231
35	Spain	210,762	2,646	9,259	32,628	96,122
36	Cambodia	52,470	85,539	70,548	129,191	86,201
37	Mozambique	107,586	140,434	18,519	59,525	73,855
38	El Salvador	114,420	137,789	98,106	77,823	73,414
39	Tanzania	40,345	122,357	69,666	85,980	71,650
40	Nicaragua	13,228	27,337	27,117	29,983	70,548
	All Other Countries	2,071,022	1,957,264	1,649,058	1,446,453	1,022,063
	Grand Total	67,905,018	62,311,891	52,005,502	54,385,612	51,641,518

Source: USDA Foreign Agricultural Service - Global Agricultural Trade System, <http://www.fas.usda.gov/gats/default.aspx>.
Prepared by Bryant Christie Inc.

U.S. HOP EXPORTS BY PRODUCT (TOP 40) – 2013/14

2013/14 Rank	Country	Extract (Converted to Raw Hop Equivalent)	Fresh/Dried	Ground	Pellets	Grand Total
1	United Kingdom	6,191,462	898,825	3,968	1,167,568	8,261,823
2	Mexico	6,140,315	77,603	41,006	360,235	6,619,159
3	Belgium-Luxembourg	3,867,790	128,529	0	901,029	4,897,348
4	Brazil	1,846,592	3,748	33,069	2,092,628	3,976,037
5	China	3,330,744	20,503	0	252,209	3,603,455
6	Germany	1,907,439	8,598	2,646	1,000,017	2,918,700
7	Colombia	1,045,873	0	0	1,475,113	2,520,986
8	Canada	439,161	125,443	198,636	1,673,308	2,436,549
9	Venezuela	1,950,650	0	0	0	1,950,650
10	Korea, South	1,542,354	0	0	102,515	1,644,869
11	Japan	1,020,299	24,251	0	559,092	1,603,642
12	Hong Kong	932,114	13,228	0	351,858	1,297,200
13	Australia	705,479	48,722	0	301,372	1,055,573
14	Dominican Republic	879,203	0	0	10,803	890,006
15	Argentina	534,400	0	0	352,078	886,479
16	Peru	478,844	0	0	232,588	711,432
17	Ecuador	317,466	0	0	205,912	523,377
18	Thailand	404,769	0	0	61,289	466,057
19	Chile	422,406	661	0	39,463	462,530
20	Russia	312,175	0	0	133,380	445,554
21	Vietnam	355,385	0	17,857	4,189	377,431
22	South Africa	356,267	0	0	13,228	369,495
23	Philippines	98,767	0	0	264,334	363,101
24	Netherlands	204,589	6,614	0	83,114	294,317
25	India	156,087	0	0	63,714	219,801
26	Indonesia	153,442	18,519	0	26,455	198,416
27	Guatemala	120,813	3,968	0	41,447	166,229
28	Bolivia	14,991	0	0	147,048	162,040
29	Panama	113,759	8,818	0	38,581	161,158
30	France	156,969	1,323	0	882	159,174
31	Trinidad and Tobago	149,032	0	0	0	149,032
32	Kenya	49,384	0	0	82,673	132,057
33	Nigeria	113,759	0	0	0	113,759
34	Malaysia	110,231	0	0	0	110,231
35	Spain	75,839	0	0	20,283	96,122
36	Cambodia	71,430	0	0	14,771	86,201
37	Mozambique	0	0	0	73,855	73,855
38	El Salvador	58,202	0	0	15,212	73,414
39	Tanzania		0	0	71,650	71,650
40	Nicaragua	70,548	0	0	0	70,548
	All Other Countries	716,943	13,007	4,630	287,483	1,022,063
	Grand Total	37,415,971	1,402,360	301,813	12,521,374	51,641,518

Source: USDA Foreign Agricultural Service - Global Agricultural Trade System, <http://www.fas.usda.gov/gats/default.aspx>.
Prepared by Bryant Christie Inc.

WORLD BEER PRODUCTION (FIVE YEARS - MILLION HL)

	2010	2011	2012	2013	2014*
Germany	98.3	98.2	94.6	94.4	95.3
Russia	103.0	99.4	97.2	88.9	82.0
Great Britain	45.0	42.5	42.0	42.4	42.0
Poland	33.5	37.9	37.8	39.6	39.8
Spain	32.7	33.6	33.0	33.1	34.5
Ukraine	30.9	30.5	30.0	27.6	26.0
Netherlands	24.0	23.6	24.3	23.7	23.1
Czech Republic	17.0	18.3	18.3	18.6	18.6
France	14.3	16.0	18.9	18.7	18.5
Belgium	18.0	18.0	18.5	18.1	18.0
Romania	15.5	17.0	17.9	16.6	16.5
Italy	12.3	13.4	12.7	12.7	12.8
Austria	9.0	8.9	8.9	9.2	9.2
Ireland	8.4	8.6	8.3	8.0	8.0
Portugal	8.3	8.3	7.6	7.9	8.0
Turkey	9.7	9.8	10.0	8.0	7.5
Other Europe	49.4	53.1	49.6	36.2	29.0
Total Europe	544.3	548.0	544.5	531.1	523.9
USA	228.4	226.0	226.5	224.6	225.7
Brazil	113.9	127.2	132.0	134.2	136.0
Mexico	80.0	81.2	81.5	82.0	82.0
Venezuela	22.0	23.2	21.7	22.2	24.0
Canada	22.4	19.8	19.5	22.6	22.7
Colombia	19.5	20.8	22.3	22.3	22.3
Argentina	17.0	17.3	17.5	16.8	16.5
Other Americas	39.2	52.1	59.4	66.2	70.8
Total Americas	545.2	558.1	565.4	572.2	576.8
P.R. China	449.0	489.9	490.0	506.0	518.0
Japan	57.0	56.0	55.3	57.2	57.0
Vietnam	25.0	27.0	29.7	32.0	32.8
Thailand	19.2	20.4	23.9	21.0	23.1
South Korea	18.5	18.8	19.0	19.4	20.9
India	14.8	18.3	19.2	20.0	20.0
Philippines	15.2	15.7	15.8	16.2	16.5
Other Asia	76.2	123.1	133.4	158.7	177.4
Total Asia	626.2	673.1	683.4	708.7	727.4
South Africa	29.5	30.0	31.3	31.5	31.8
Nigeria	17.5	19.4	23.5	25.0	26.0
Other Africa	58.7	63.0	74.2	86.4	91.9
Total Africa	100.2	104.5	115.7	127.9	133.4
Australia	17.2	16.6	17.2	17.3	17.4
New Zealand	3.2	3.3	3.2	2.9	3.0
Oceania	1.2	1.2	1.2	1.5	1.5
Total Australia	21.6	21.1	21.6	21.7	21.9
WORLD TOTALS	1,837.5	1,916.5	1,941.0	1,961.5	1,983.3
* Estimate					

Source: S.S. Steiner 2014 Guidelines for Hop Buying

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) – 2011-12 (MILLION HL)

Brewery	2012 Production	2012 % Share	2013 Production	2013 % Share
ABInBev	352.9	18.1%	399.0	20.2%
SABMiller	190.0	9.7%	187.4	9.5%
Heineken	171.7	8.8%	178.3	9.0%
Carlsberg	120.4	6.2%	119.7	6.1%
China Res. Snow Breweries	106.2	5.4%	117.1	5.9%
Tsingtao Brewery Group	78.8	4.0%	78.3	4.0%
Molson-Coors	55.1	2.8%	59.7	3.0%
Yanjing	54.0	2.8%	57.1	2.9%
Kirin	49.3	2.5%	49.3	2.5%
Top 10 total	1,178.4	60.3%	1,245.9	63.1%

The top 3 brewing groups control 38.7% of the market share.

The top 40 brewing groups worldwide represented 81.4% market share in 2013, down from 82.4% in 2012.

Source: Barth Report 2013-14