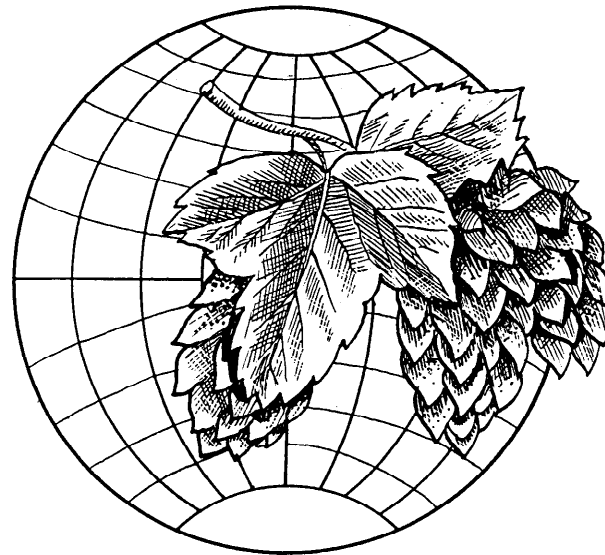


INTERNATIONAL HOP GROWERS' CONVENTION



ECONOMIC COMMISSION - SUMMARY REPORTS

PRAGUE, CZECH REPUBLIC
NOVEMBER, 2017



International Hop Growers' Convention

IHGC - Economic Commission Summary Reports

Prague, Czech Republic - November, 10, 2017

Country	Hop Acreage 2016 (Hectares, Ha)					Hop Production 2016 (in MT = 1.000 kg)			Alpha acid Prod. MT	Hop Acreage 2017 (Hectares, Ha) estimations					Hop Production 2017 (in MT = 1.000 kg) estimations			Alpha acid Prod. MT
	Aroma	Alpha	Hop area ¹	New	Total	Aroma	Alpha	Total		Aroma	Alpha	Hop area ¹	New	Total	Aroma	Alpha	Total	
Australia [°]	100	446	546	0	546	205	900	1 105	145	100	446	546	85	631	238	1 200	1 438	211
Austria	187	58	245	4	249	365	114	479	41	186	58	243	7	250	325	114	439	35
Belgium	89	60	149	4	149	107	91	198	15	114	54	169	20	169	126	79	205	18
China [°]	200	1 800	2 000	0	2 000	300	4 200	4 500	300	200	1 800	2 000	0	2 000	400	5 100	5 500	400
Czech Republic	4 381	46	4 427	348	4 775	7 610	102	7 712	341	4 583	46	4 629	316	4 945	6 555	95	6 650	245
France	381	33	414	45	459	700	72	772	25	401	36	437	44	481	676	87	763	27
Germany	10 063	7 254	17 317	1 281	18 598	22 214	20 552	42 766	4 775	10 492	7 574	18 066	1 477	19 543	20 250	21 050	41 300	4 200
New Zealand	360	52	412	0	412	679	115	794	75	371	71	442	30	442	620	140	760	72
Poland [°]	602	797	1 398	76	1 475	1 117	1 926	3 044	262	632	843	1 475	140	1 615	800	1 700	2 500	169
Romania	68	192	260	10	270	57	138	195	20	73	192	265	5	270	65	140	205	20
Russia [°]	220	200	420	0	420	200	244	444	35	220	200	420	50	470	250	250	500	40
Serbia [°]	34	33	67	12	79	58	76	134	11	34	33	67	12	79	58	76	134	11
Slovakia	137	0	137	0	137	187	0	187	7	137	0	137	0	137	104	0	104	5
Slovenia	1 312	23	1 335	149	1 484	2 400	76	2 476	135	1 400	20	1 420	170	1 590	2 676	60	2 736	150
South Africa	7	406	413	0	413	17	848	865	100	34	390	424	0	424	46	658	710	85
Spain [°]	0	536	536	0	536	0	946	946	111	0	537	537	1	537	0	550	550	70
Ukraine [°]	309	60	369	0	369	400	80	480	30	309	60	369	0	369	400	80	480	30
UK-England	706	213	919	25	919	1 000	400	1 400	110	809	158	967	103	967	1 281	500	1 781	132
USA	17 119	4 314	21 433	3 126	21 433	29 421	10 785	40 206	4 082	17 908	5 012	22 920	1 487	22 920	35 008	13 059	48 067	5 114
IHGC	36 275	16 523	52 797	5 080	54 723	67 037	41 665	108 703	10 620	38 003	17 530	55 533	3 947	57 839	69 878	44 938	114 822	11 034

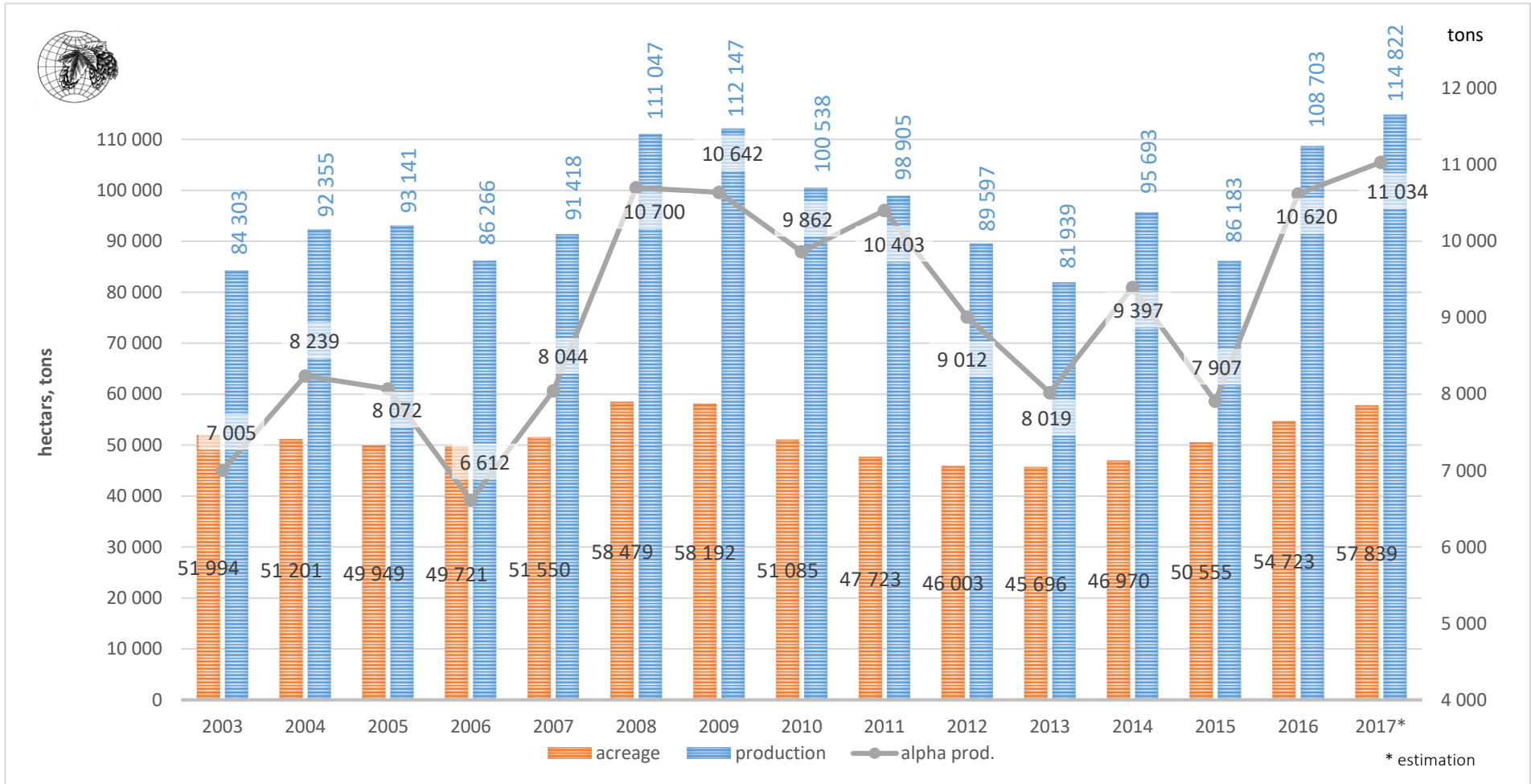
[°] Since no country updates were available, figures from Yakima in 2017 were used.

¹ Acreage without new hop areas

Blue colored - correction from the meeting, figures received after meeting

Difference Σ 2017-2016 1 728 1 007 2 736 -1 133 3 116 2 841 3 273 6 119 414

Figure 1: Comparison of IHGC crops 2003 - 2017* (acreage, production, alpha acids production)



International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

Austria

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	23,4	6,4	19,5	6,0	-3,9	-16,6
Alpha	17,1	15,0	15,5	13,6	-1,6	-9,2
Total	40,5		35,0			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons	440	400	330	320	200	
% Crop / Year N	100	95	80	75	50	

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops		0	0	0
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops	0	8,1			
Alpha Hops	0	9			
Average Price					
Contract Prices					
Aroma Hops	6,5	7,3	7,2	-1,4	Erzeugerpreis / kg RH
Alpha Hops	7,2	7,7	7,5	-2,6	Erzeugerpreis / kg RH
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date: 03.11.2017

Member Organization:

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

BELGIUM

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma			5,0	5,0		
Alpha			13,0	11,0		
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	60%	60%	40%	40%	40%	40%

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Too less water and very high temperature till end of July = production -10 %
Demand for old Belgium varieties as Groene Bel, Record, a.o.

Country, Date: 06/11/2017

Member Organization(s): Joris Cambie

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country: Czech Republic

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	4381	4583	202	4,6
Alpha	46	46	0	0,0
Total	4427	4629	202	4,6

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma	348	312
Alpha	0	4
Total	348	316

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	4729	4895	166	3,5
Alpha	46	50	4	8,7
Total	4775	4945	170	3,6

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	7 610	6 555	-1 055	-13,9
Alpha	102	95	-7	-6,9
Total	7 712	6 650	-1 062	-13,8

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma	1,61	1,34	-16,8
Alpha	2,22	1,90	-14,3
Total	1,61	1,34	-16,5

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	4190	4317	127	3,5	3,0	
Sládek	267	295	28	6,5	6,2	
Premiant	175	165	-10	8,5	7,6	
Saaz Late	41	44	3	4,5	3,0	
Kazbek	21	34	13		5,5	
Alpha						
Agnus	39	42	3			

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country: Czech Republic

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	331,0		234,0		-97,0	-29,3
Alpha	10,0		9,0		-1,0	-10,0
Total	341,0		245,0		-96,0	-28,2

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	100	100	100	95	80	75

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price					
Contract Prices					
Aroma Hops	6,8	7,3			farmer price
Alpha Hops	4,5	5			farmer price
Average Price					
Average Prices					
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
03.11.2017

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

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

France

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017	Difference N - (N-1)	Difference %
Aroma	381	400,84	20	105,2%
Alpha	33,4	35,98	3	107,7%
Total	414	436,82	23	105,5%

New Hop Area (Ha)	Year N-1 2016	Year N
Aroma	42,4	41,0
Alpha	2,6	3,0
Total	45	44

TOTAL Hop Area (Ha)	Year N-1 2016	Year N	Difference N - (N-1)	Difference %
Aroma	423,4	441,9	18	104,4%
Alpha	36	39,0	3	108,3%
Total	459	481	22	104,8%

Production MT=Metric Tons	Year N-1 2016	Year N 2017	Difference N - (N-1)	Difference %
Aroma	700	676	-24	96,6%
Alpha	72	87	15	120,8%
Total	772	763	-9	98,8%

Yield MT/Ha	Year N-1 2016	Year N 2017	Difference %
Aroma	1,8	1,6	0,9
Alpha	2,2	2,4	1,1
Total	1,9	1,8	0,9

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						
Strisselspalt	187	181	-6	2,00		
Aramis	48,5	53	4,5	5,80		
Tradition	31	28,3	-2,7	4,80		
Triskel	22	39	17	3,50		
Fuggle	44,3	48,5	4,2	4,60		
Golding	44,6	45	0,4	3,50		
Challenger	5,7	6	0,3	6,30		
Barbe-Rouge	9,5	10,6	1,1	6,00		
Mistral	7	7	0	5,50		
Cascade	2	4,5	2,5			
Alpha						
Columbus	5,6	4,3	-1,3	10,00		
Brewers Gold	15	16	1	5,50		
Nugget	6,3	7,1	0,8	10,00		
Magnum	4,7	4,7	0	12,00		
Target	5,9	5,7	-0,2	10,50		

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

France

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	2017	%		%
Aroma	17,2	3,2			-17,2	0,0
Alpha	7,8	7,4			-7,8	0,0
Total	25,0	3,9			-25,0	0,0

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	97	90	80	63	30	30

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production		676	87	763
- Sold Production		630	87	717
= Unsold Hops		46	0	46
% unsold Hops		6,80	0,00	6,03

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
<i>Aroma Hops</i>					
<i>Alpha Hops</i>					
<i>Average Price</i>					
Contract Prices					
<i>Aroma Hops</i>					
<i>Alpha Hops</i>					
<i>Average Price</i>					
Average Prices					
<i>Aroma Hops</i>					
<i>Alpha Hops</i>					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
November 6, 2017

Member Organization(s):
AGPH
Francis Heitz

International Hop Growers' Convention

IHGC-Economic Commission: November 2017 - Prague, CZ

Country:

Germany

Hop area (ha)	Year N-1 2016	Year N 2017	Difference N - (N-1)	Difference %
Aroma	10063	10492	429	4,3
Alpha	7254	7574	320	4,4
Total	17317	18066	749	4,3

New Hop Area (ha)	Year N-1 2016	Year N 2017
Aroma	471	583
Alpha	810	894
Total	1281	1477

TOTAL Hop area (ha)	Year N-1 2016	Year N 2017	Difference N - (N-1)	Difference %
Aroma	10534	11075	541	5,1
Alpha	8064	8468	404	5,0
Total	18598	19543	945	5,1

Production MT	Year N-1 2016	Year N 2017 estimate	Difference N - (N-1)	Difference %
Aroma	22 214	20 250	-1 964	-8,8
Alpha	20 552	21 050	498	2,4
Total	42 766	41 300	-1 466	-3,4

Yield MT/HA.	Year N-1 2016	Year N 2017 estimate	Difference %
Aroma	2,1	1,8	-13,3
Alpha	2,5	2,5	-2,5
Total	2,3	2,1	-8,1

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Perle	3093	2966	-127	8,2	6,9	-1,3
Hall.Tradition	2827	2704	-123	6,4	5,7	-0,7
Hersbrucker	943	915	-28	2,8	2,3	-0,5
Hallertauer	733	723	-10	4,3	3,5	-0,8
Tettnanger	732	747	15	3,8	3,6	-0,2
Spalter Select	534	532	-2	5,2	4,6	-0,6
Saphir	450	473	23	4	3	-1
Spalter	119	121	2	4,3	3,2	-1,1
Mand. Bavaria	346	356	10	8,7	7,3	-1,4
Alpha						
Herkules	4884	5797	913	17,3	15,5	-1,8
Hall. Magnum	2196	2011	-185	14,3	12,6	-1,7
Hall.Taurus	357	284	-73	17,6	15,9	-1,7
North. Brewer	266	300	34	10,5	7,8	-2,7
Nugget	152	131	-21	12,9	10,8	-2,1
Polaris	106	174	68	21,3	19,6	-1,7
Hall. Merkur	21	17	-4	13,4	11,5	-1,9
Brewers Gold	17	16	-1	7,2	7	-0,2
Comet	7	8	1			0

International Hop Growers' Convention

IHGC-Economic Commission: November 2017 - Prague, CZ

Country:

Germany

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	estimate	%		%
Aroma	1420,0	6,4	1100,0	5,4	-320,0	-1,0
Alpha	3355,0	16,3	3100,0	14,7	-255,0	-1,6
Total	4 775	11,2	4200,0	10,2	-575,0	-1,0

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric Tons	38142	40637	38877	37516	27691	25181
% Crop / Year N	92	98	94	91	67	61

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production		22 214	20 552	42 766
- Sold Production		22 214	20 552	42 766
= Unsold Hops		0,00	0,00	0,00
% unsold Hops		0	0	0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. 2016 vs. 2015	Kind of Price
Spot Prices					
Aroma Hops	9,09	6,57		-27,70	Farmer Price
Alpha Hops	5,48	6,59		20,30	Farmer Price
Average Price	6,5	6,58		1,20	Farmer Price
Contract Prices					
Aroma Hops	4,92	5,36		8,90	Farmer Price
Alpha Hops	3,74	4,39		17,40	Farmer Price
Average Price	4,34	4,88		12,40	Farmer Price
Average Prices					
Aroma Hops	5,15	5,6		8,70	Farmer Price
Alpha Hops	3,97	4,8		20,90	Farmer Price
AVERAGE	5,54	5,21		-6,00	Farmer Price

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:

Verband deutscher Hopfenpflanzer

Germany

06.11.2017

gez. Brunner

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:
Romania

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	5,1	8,9	5,4	8,3	0,3	-0,6
Alpha	15,0	10,9	14,3	10,2	-0,7	-0,7
Total	20,1	10,3	19,7	9,6	-0,4	-0,7

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons	205	220	240	270	290	
% Crop / Year N	100	93	96	100	100	

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production		57	138	195
- Sold Production		57	138	195
= Unsold Hops		0	0	0
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
3. nov. 2017

Member Organization(s):



International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

Slovenia

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	1 312	1 400		
Alpha	23	20		
Total	1 335	1 420	85	6,4

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma	149	170
Alpha		
Total	149	170

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	1 461	1 570		
Alpha	23	20		
Total	1 484	1 590	106	7,1

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	2 476	2 736	260	10,5

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma			
Alpha			
Total	1.7	1,7	

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
Aurora	474	482	8			
Savinjski golding	168	178	10			
Styrian golding=Celeia	572	594	22			
Bobek	148	163	15			
Styrian Gold	43	49	6			
Styrian Wolf	12	35	23			
Styrian Cardinal	6	15	9			
			93			
Alpha						
Hall. Magnum	15	15	0			
Extra Styrian Dana	8	5	-3			

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

Slovenia

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	135,0					

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	85	85	70	60	60	60

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				2 476
- Sold Production				2 476
= Unsold Hops				
% unsold Hops				0

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% Diff. N vs. (N-1)	Kind of Price
Spot Prices					
Aroma Hops					
Alpha Hops					
Average Price		7.5			
Contract Prices					
Aroma Hops					
Alpha Hops					
Average Price		5.2			
Average Prices	4.5 - 6.0				
Aroma Hops					
Alpha Hops					
AVERAGE					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Hop market encouraged growers to enlarge their acreage with Styrian aroma and flavor hops. Areas with new hops in Slovenia include varieties Aurora, Styrian golding and domestic flavour hops - such as Styrian Wolf and Styrian Cardinal. End of May a hailstorm with a strong rain damaged hops in the Savinja Valley, early July also in the area of Polskava. Final crop statistics 2017 will be available at the end of November.

Styrian hops from Slovenia - a good choice for global craft beers.

Country, Date:
Slovenia, October 26, 2017

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

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

South Africa

Hop Area (Ha = Hectares)	Year N-1 2017	Year N 2018 <i>(estimate)</i>	Difference N - (N-1)	Difference %
Aroma	34	73	39	
Alpha	390	344	-46	
Research/Other	9	9	0	
Total	424	426	2	

New Hop Area (Ha)	Year N-1 2017	Year N 2018 <i>(estimate)</i>
Aroma		39
Alpha		-46
Total		

TOTAL Hop Area (Ha)	Year N-1 2017	Year N 2018 <i>(estimate)</i>	Difference N - (N-1)	Difference %
Aroma	34	73	39	
Alpha	390	344	-46	
Research/Other	9	9	0	
Total	424	426	2	

Production MT=Metric Tons	Year N-1 2017	Year N 2018 <i>(estimate)</i>	Difference N - (N-1)	Difference %
Aroma	46	125	79	173,5
Alpha	658	664	6	1,0
Research/Other	7	12	5	67,1
Total	710	800	90	12,6

Yield MT/Ha	Year N-1 2017	Year N 2018 <i>(estimate)</i>	Difference %
Aroma	1,3	1,7	26,9
Alpha	1,7	1,9	12,7
Research/Other	1,3	1,3	-2,7
Total	1,7	1,9	12,0

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/Dual						
Southern Aroma	3,1	2,6	-0,5	6,0	4,6	
Southern Passion	11,1	38	26,9	11,0	11,0	
African Queen	20,2	32,7	12,5	11,6	12,0	
Alpha						
Southern Dawn	38,2	36	-2,2	13,5	13,0	
Southern Promise	98,4	103,7	5,3	11,6	11,0	
Southern Star	251,8	204,4	-47,4	14,6	14,5	
U1/108	0,7	1,3	0,6	13,3	12,5	
N1/69	0,3	0,3	0	9,8	9,5	
Southern Brewer	0,2	0,2	0	10,1	10,0	
Research (Other)		7,3	7,3	9,0	9,0	

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country: South Africa

Alpha Prod.	Year N-1	2017	Year N	2018	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total						

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2018	2019	2020	2021	2022	2023
Metric tons						
% Crop / Year N						

We grow for a brewer so this is not applicable (not just yet)

Unsold Hops (MT) : Crop Year (N-1)	2017	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2016	Year (N-1) 2017	Year (N) 2018	% 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					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Country, Date:
08.11.2017

Member Organization(s): Hop Farms
Lauren Steytler
General Manager: Hop Farms

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

UK

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	706	809	+103	
Alpha	213	158	-57	
Total	919	967	+58	

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma	+25	+103
Alpha	-	-57
Total	+25	+46

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	706	809		
Alpha	213	158		
Total	919	967		

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma				
Alpha				
Total	1 400	1 781	381	

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %
Aroma			
Alpha			
Total	1,5	1,8	

Main Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma						
EK Golding	94	98	+4			
Golding	132	140	+8			
First Gold	97	95	-2			
Fuggles	90	93	+3			
Challenger	53	59	+6			
Progress	59	77	+18			
Bramling Cross	45	44	-1			
Sovereign	55	53	-2			
WGV	33	36	+3			
Alpha						
Admiral	29	31	+2			
Target	80	67	-13			
Pilgrim	68	71	+3			
Northdown	15	18	+3			

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

UK

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma						
Alpha						
Total	110		132			

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	90	90	70	60	50	10

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops		Nil	Nil	
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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					

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

UK grew its largest crop for some years. Production was particularly high in the South East.

Country, Date: UK 01/11/2017

Member Organization(s):

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country:

USA

Hop Area (Ha = Hectares)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 119	17 908	789	4,6%
Alpha	4 314	5 012	698	16,2%
Total	21 433	22 920	1 487	6,9%

New Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)
Aroma		
Alpha		
Total		

TOTAL Hop Area (Ha)	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	17 119	17 908	789	4,6%
Alpha	4 314	5 012	698	16,2%
Total	21 433	22 920	1 487	6,9%

Includes 1011 ha outside of Pacific Northwest

Production MT=Metric Tons	Year N-1 2016	Year N 2017 (estimate)	Difference N - (N-1)	Difference %
Aroma	29 421	35 008	5 587	19,0%
Alpha	10 785	13 059	2 274	21,1%
Total	40 206	48 067	7 861	19,6%

Yield MT/Ha	Year N-1 2016	Year N 2017 (estimate)	Difference %	Pounds/Acre
Aroma	1,72	1,95		1 744
Alpha	2,50	2,61		2 325
Total	1,88	2,10		1 871

Individual Varieties (Ha = Hectares)	Year N-1 Total Acreage	Year N Total Acreage	Difference	Year N-1 Alpha %	Year N Alpha %	Difference N-(N-1)
Aroma/Dual				9,0%	9,2%	
Azacca™, ADHA-483	203	232	29			
Cascade*	3 067	3 010	-57			
Centennial*	2 160	2 160	0			
Citra®, HBC 394	1 818	2 138	320			
Chinook	850	1 020	170			
El Dorado	270	267	-3			
Mosaic™, HBC 369	1 100	1 122	22			
Simcoe®, YCR 14	1 752	1 821	69			
Willamette	650	671	21			
*Total other (non-PNW) acreage estimated at 1011 ha. Cascade, Centennial and Chinook include estimates representing a contribution from those additional states.						
Alpha				13,3%	14,5%	
Apollo™	392	375	-17			
Bravo™	293	255	-38			
CTZ	1 820	2 004	184			
Nugget	666	592	-74			
Summit™	716	654	-62			
Super Galena™	153	200	47			

International Hop Growers' Convention

IHGC-Economic Committee: November 2017 - Prague, CZ

Country: USA

Alpha Prod.	Year N-1	2016	Year N	2017	Difference	N-(N-1)
Metric Tons	Metric Tons	Av. Contents	Metric Tons	Av. Contents	Metric Tons	Av. Contents
		%	(estimate)	%		%
Aroma	2 648	9,0	3 221	9,2	573	0,2
Alpha	1 434	13,3	1 894	14,5	459	1,2
Total	4 082	10,2	5 114	10,6	1 032	0,4

Contract	Year N	Year N+1	Year N+2	Year N+3	Year N+4	Year N+5
Situation	2017	2018	2019	2020	2021	2022
Metric tons						
% Crop / Year N	98	95	65	40	30	25

Unsold Hops (MT) : Crop Year (N-1)	2016	Aroma	Alpha	Total
Total Hop Production				
- Sold Production				
= Unsold Hops				
% unsold Hops				

Hop Prices Euro / Kg	Year (N-2) 2015	Year (N-1) 2016	Year (N) 2017	% 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	US\$4.38/lb	US\$5.72/lb			
	8.37 Euro/kg	10.93 Euro/kg			

COMMENTS ON HOP PRODUCTION AND MARKET SITUATION

Exchange rate \$1 USD = 0.86 Euro (1 NOV 2017)

Alpha and aroma variety totals are based on the IHGC list of World Hop Varieties. Those varieties classified as "Dual" are included in the Aroma category for consistency. Varieties listed in the "Other" category in the US statistical reports produced by USDA-NASS are assumed to be 80% aroma and 20% alpha. Non-Pacific Northwest acreage is also assumed to be 80% aroma and 20% alpha. The USDA statistical reporting system is voluntary, and individual varieties are not reported if three or fewer growers have the variety in each state. Alpha percentages are reported as 10% lower than spectro levels, to be more consistent with EBC results.

Country, Date:
USA

XI.17

Member Organization(s):
Hop Growers of America

Figure 2: Australia hop crops 2003 - 2017*

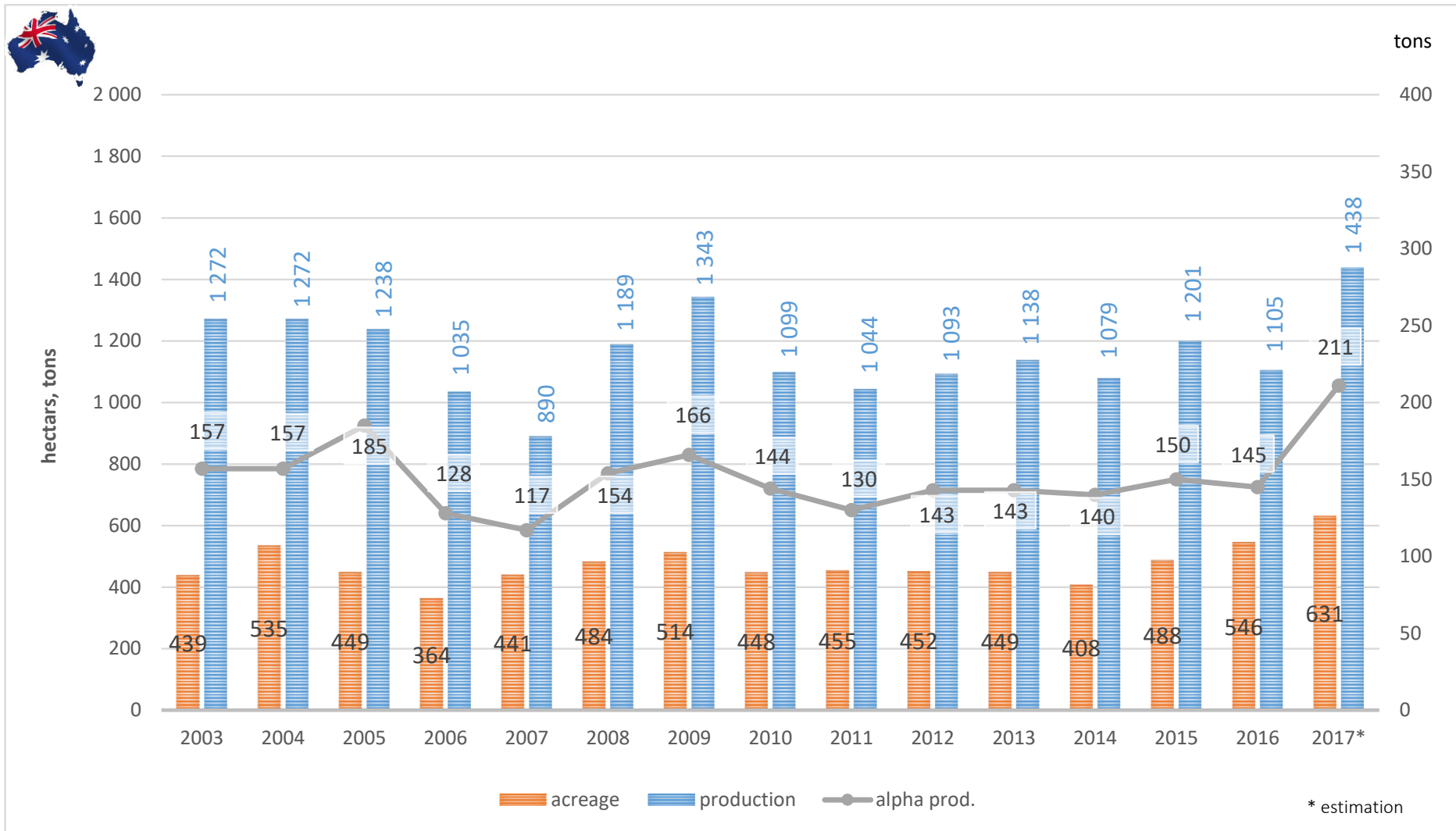


Figure 3: Austria hop crops 2003 - 2017*

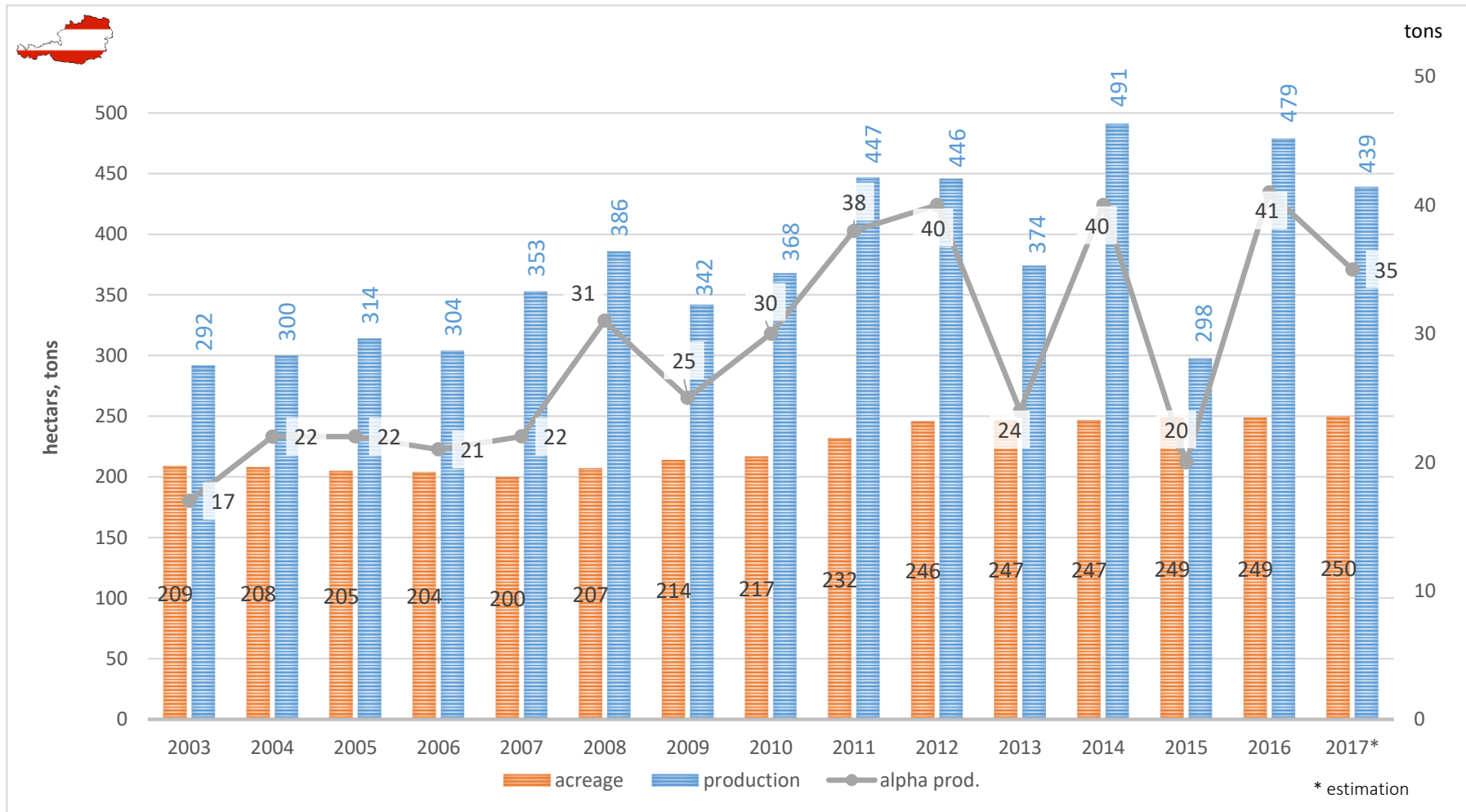


Figure 4: Belgium hop crops 2003 - 2017*

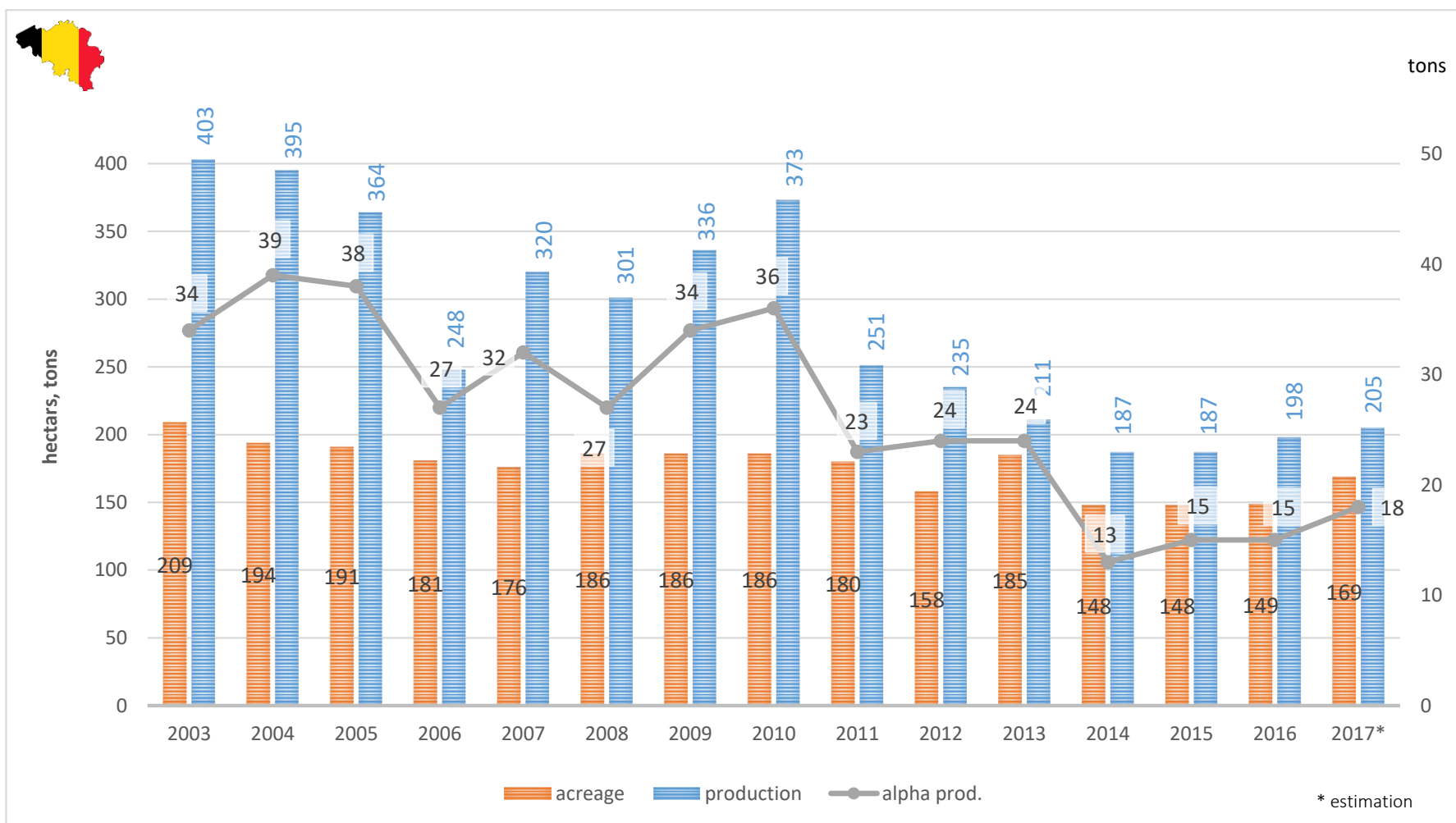


Figure 5: China hop crops 2003 - 2017*

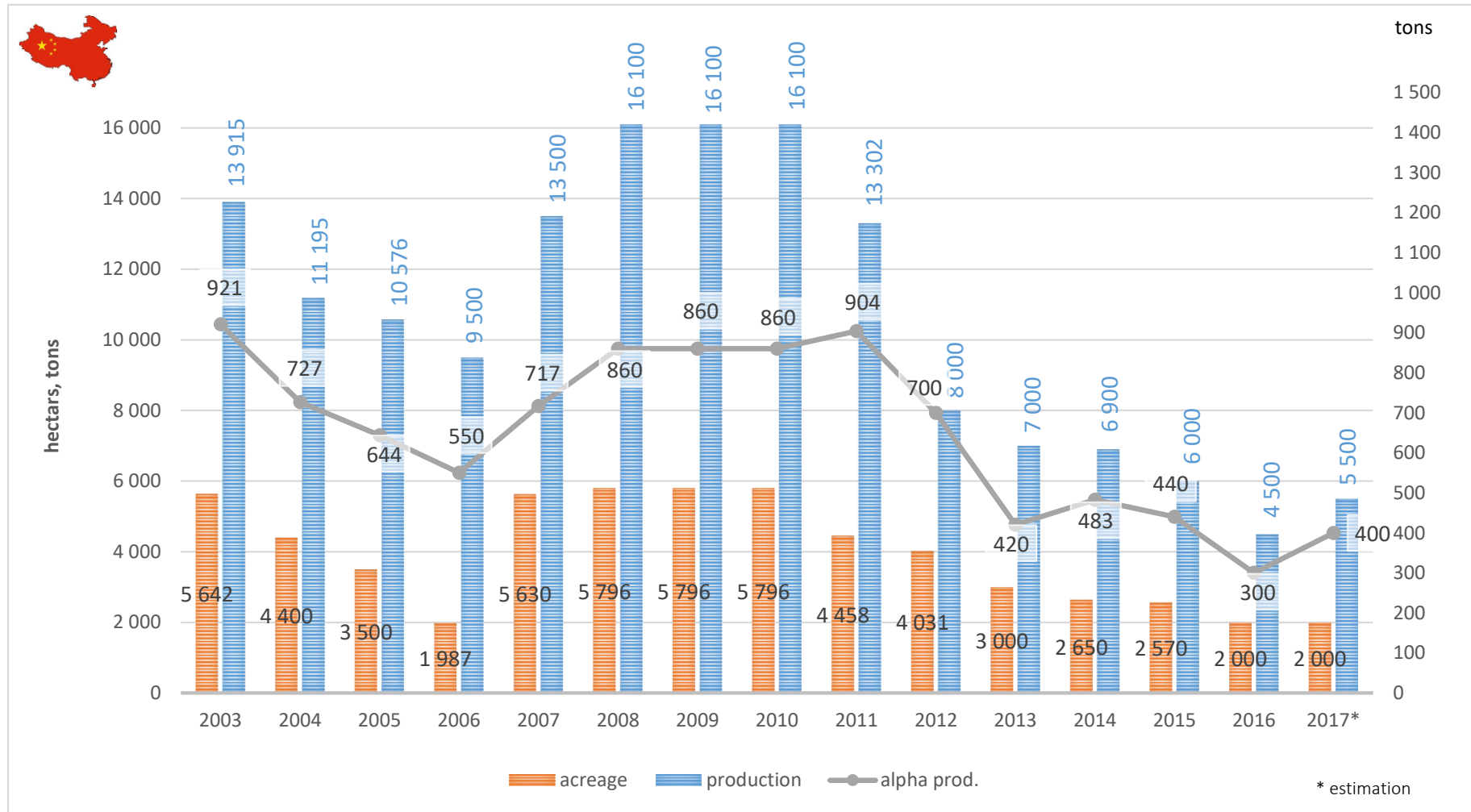


Figure 6: Czech Republic hop crops 2003 - 2017*

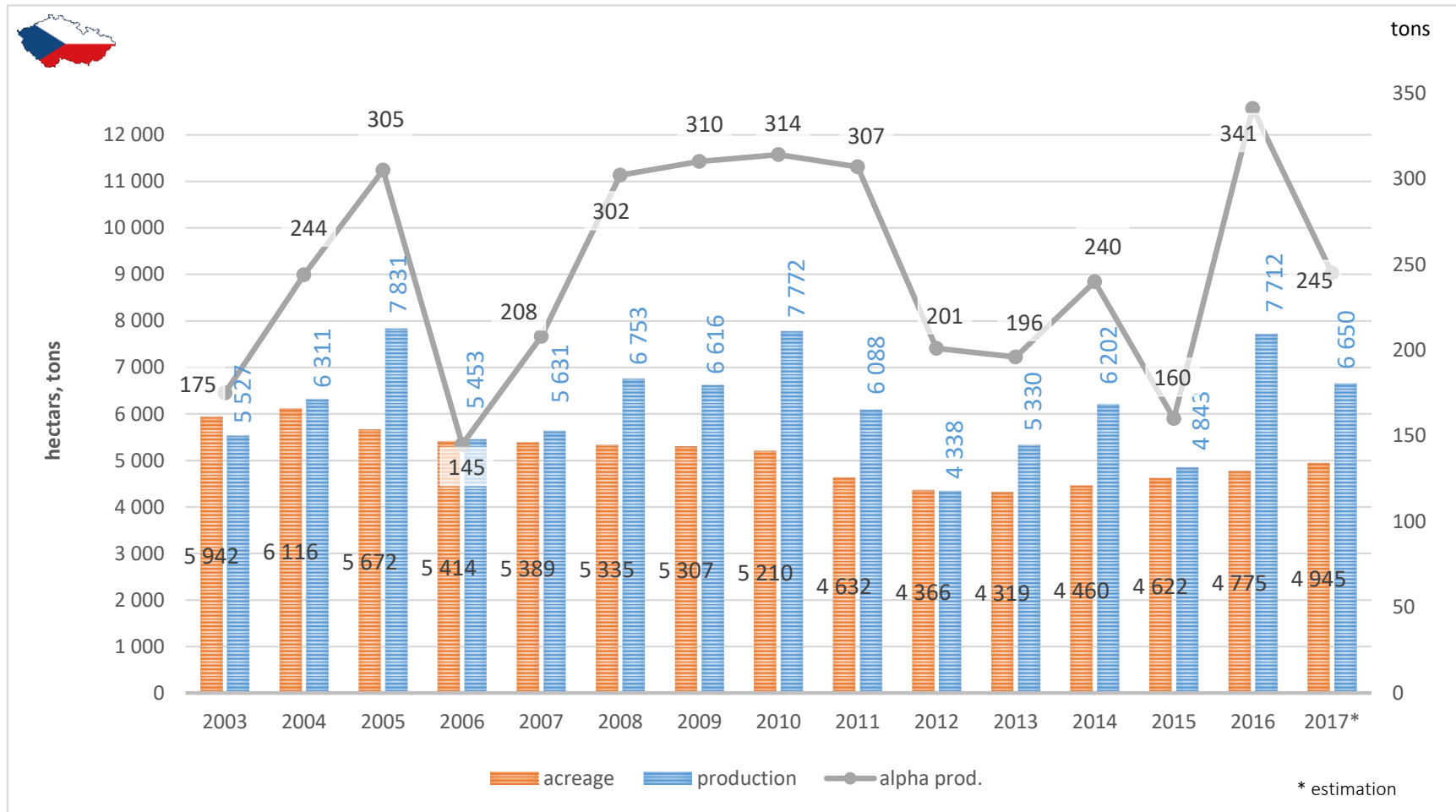


Figure 7: France hop crops 2003 - 2017*

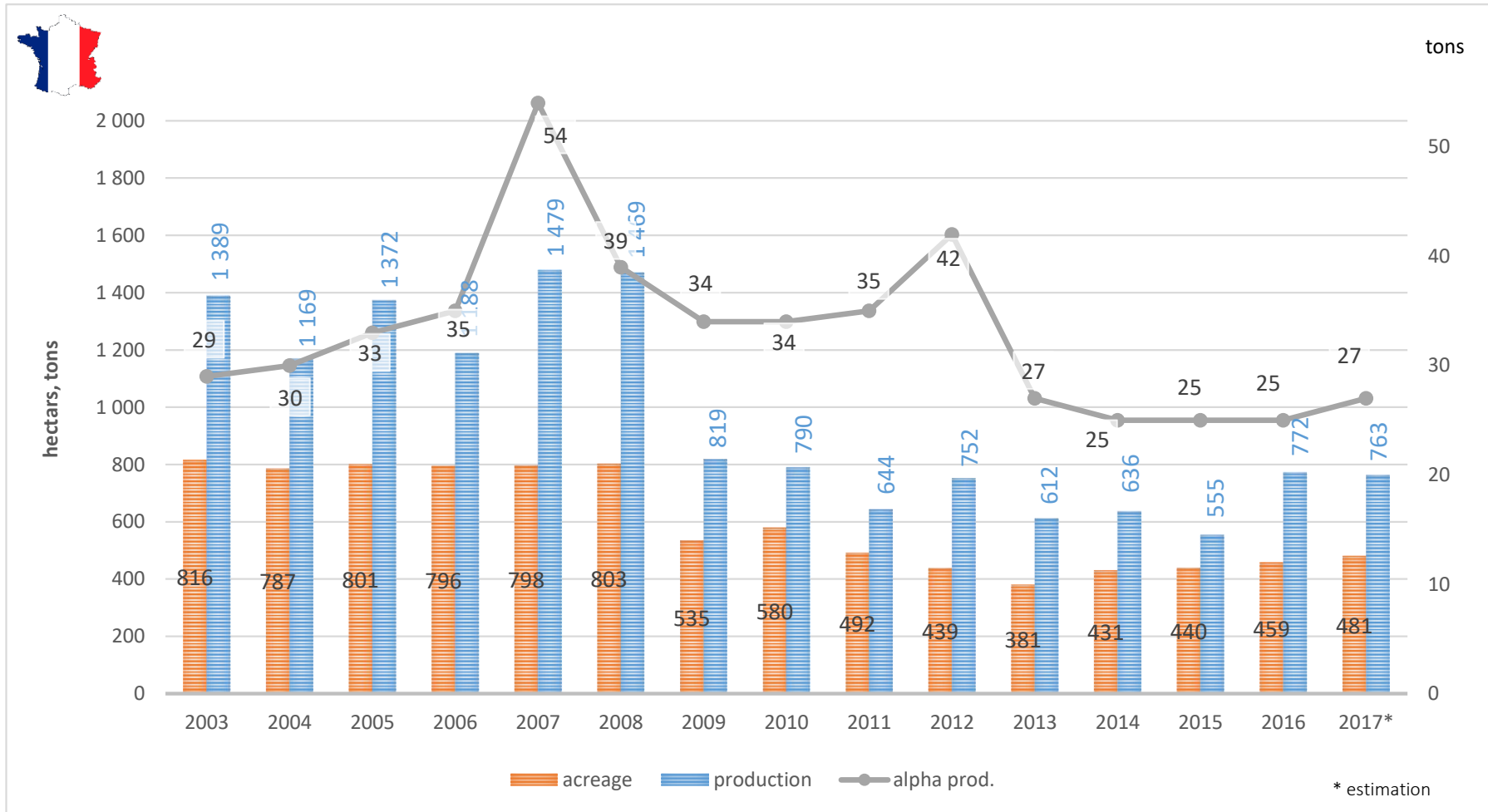


Figure 8: Germany hop crops 2003 - 2017*

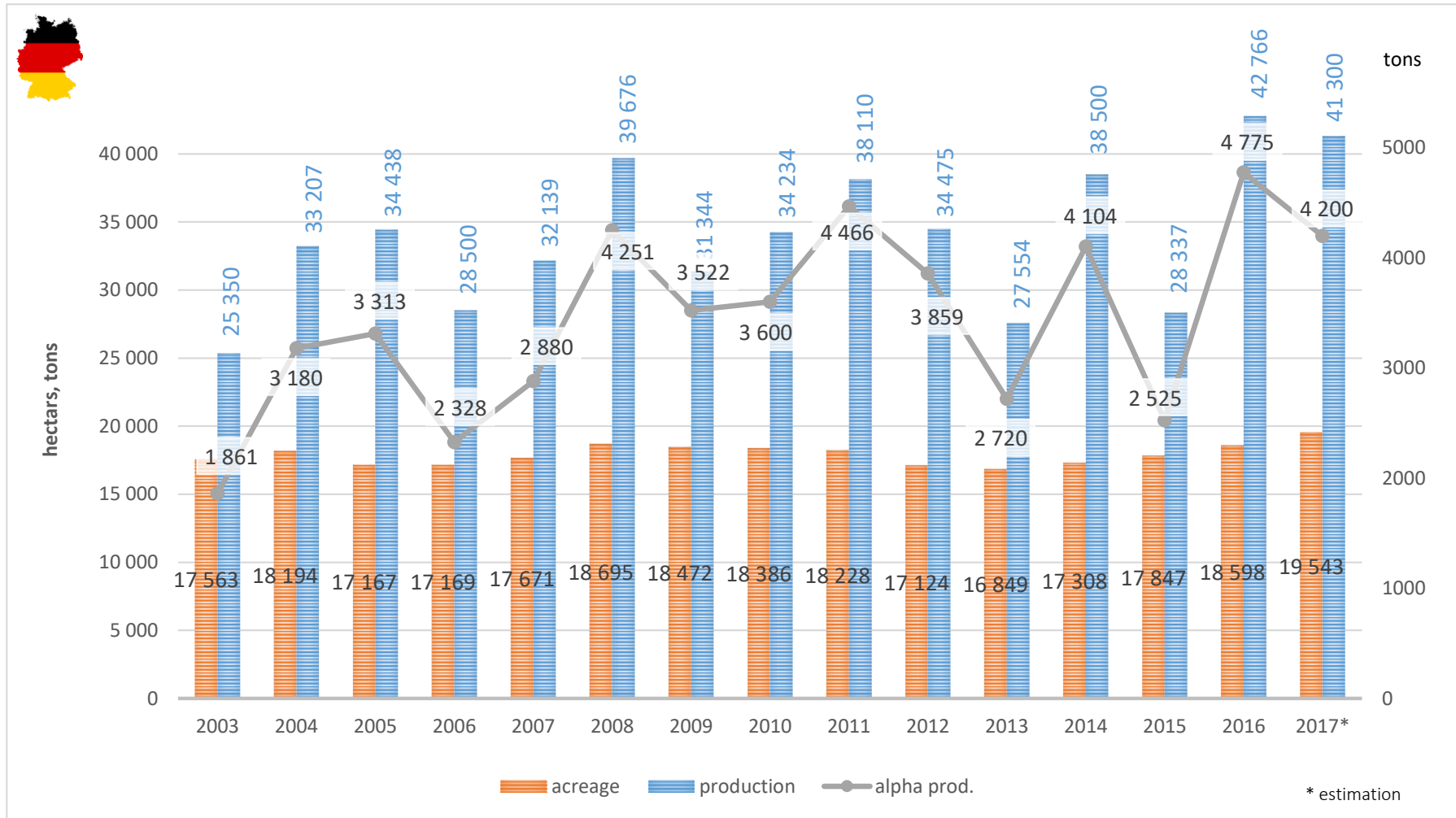


Figure 9: New Zealand hop crops 2003 - 2017

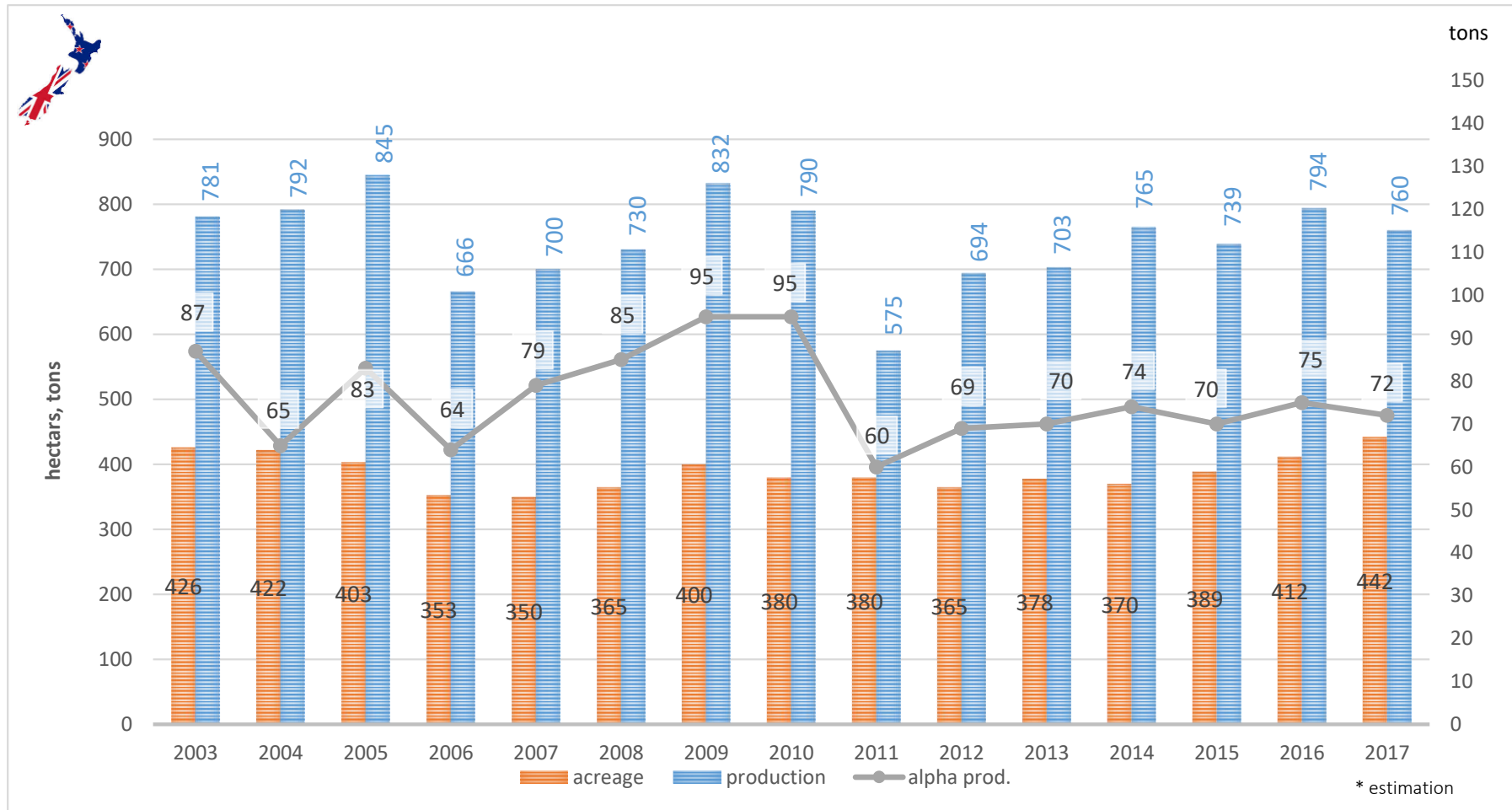


Figure 10: Poland hop crops 2003 - 2017*

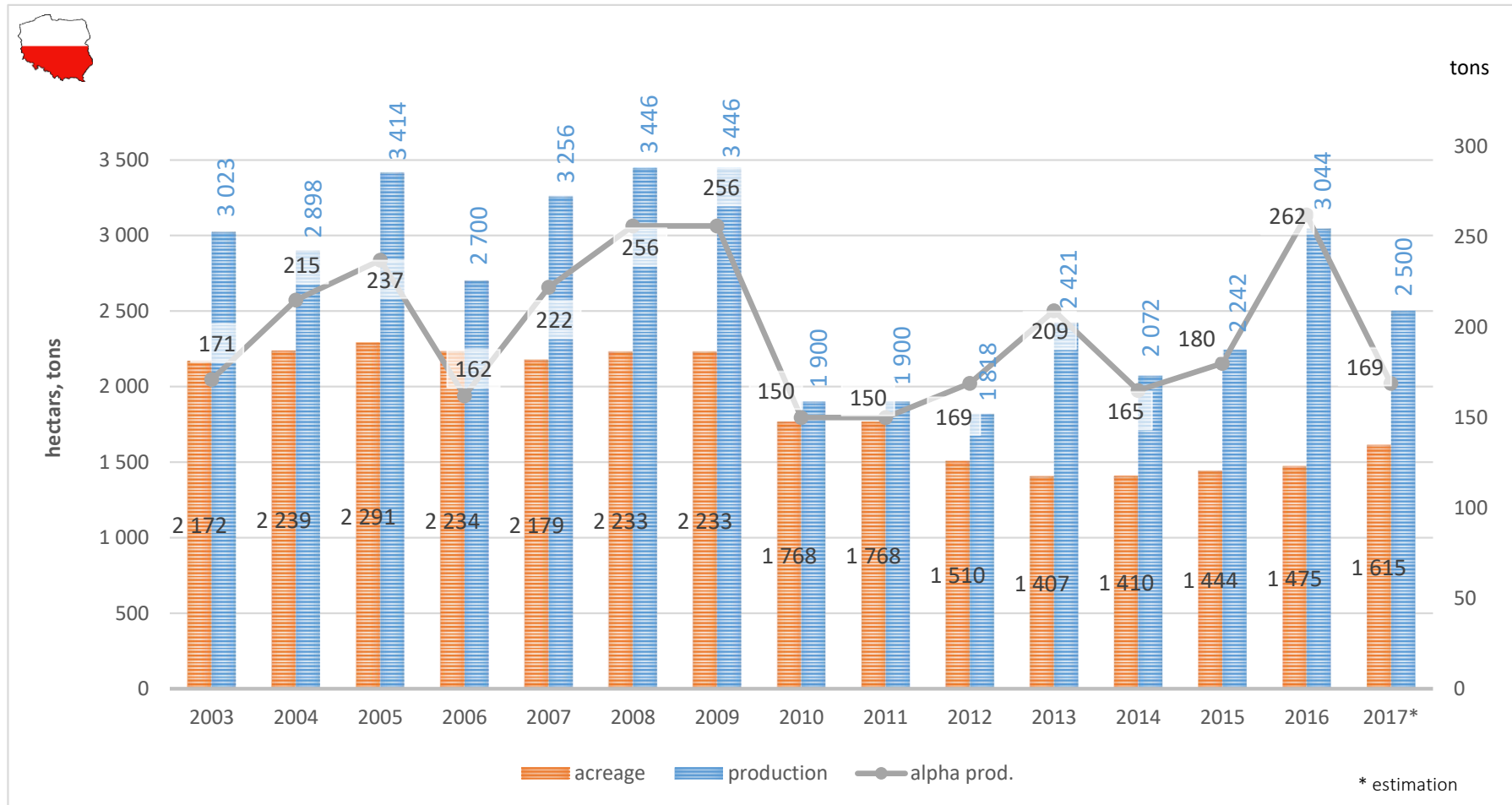


Figure 11: Romania hop crops 2003 - 2017*

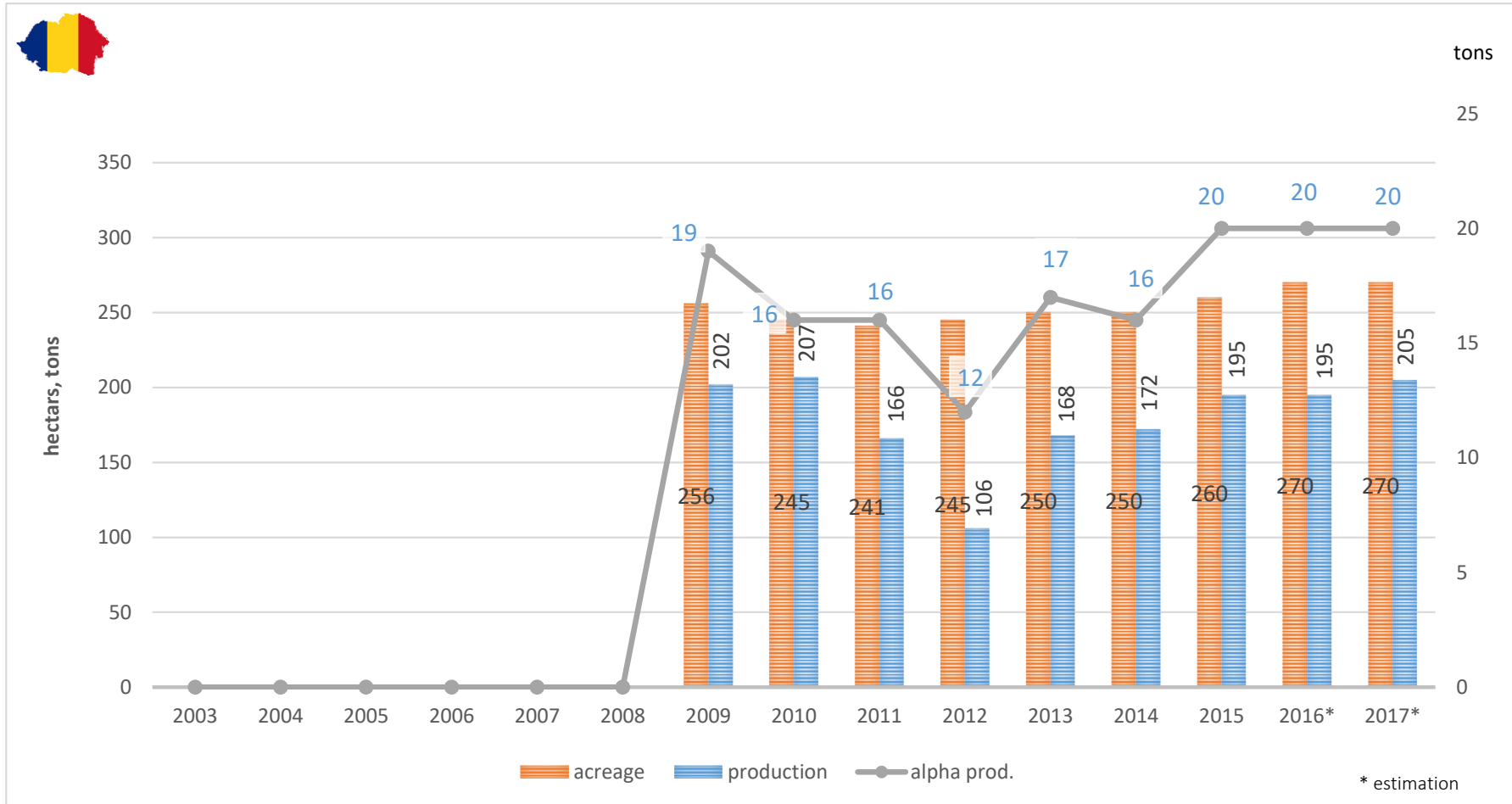


Figure 12: Slovakia hop crops 2003 - 2017*

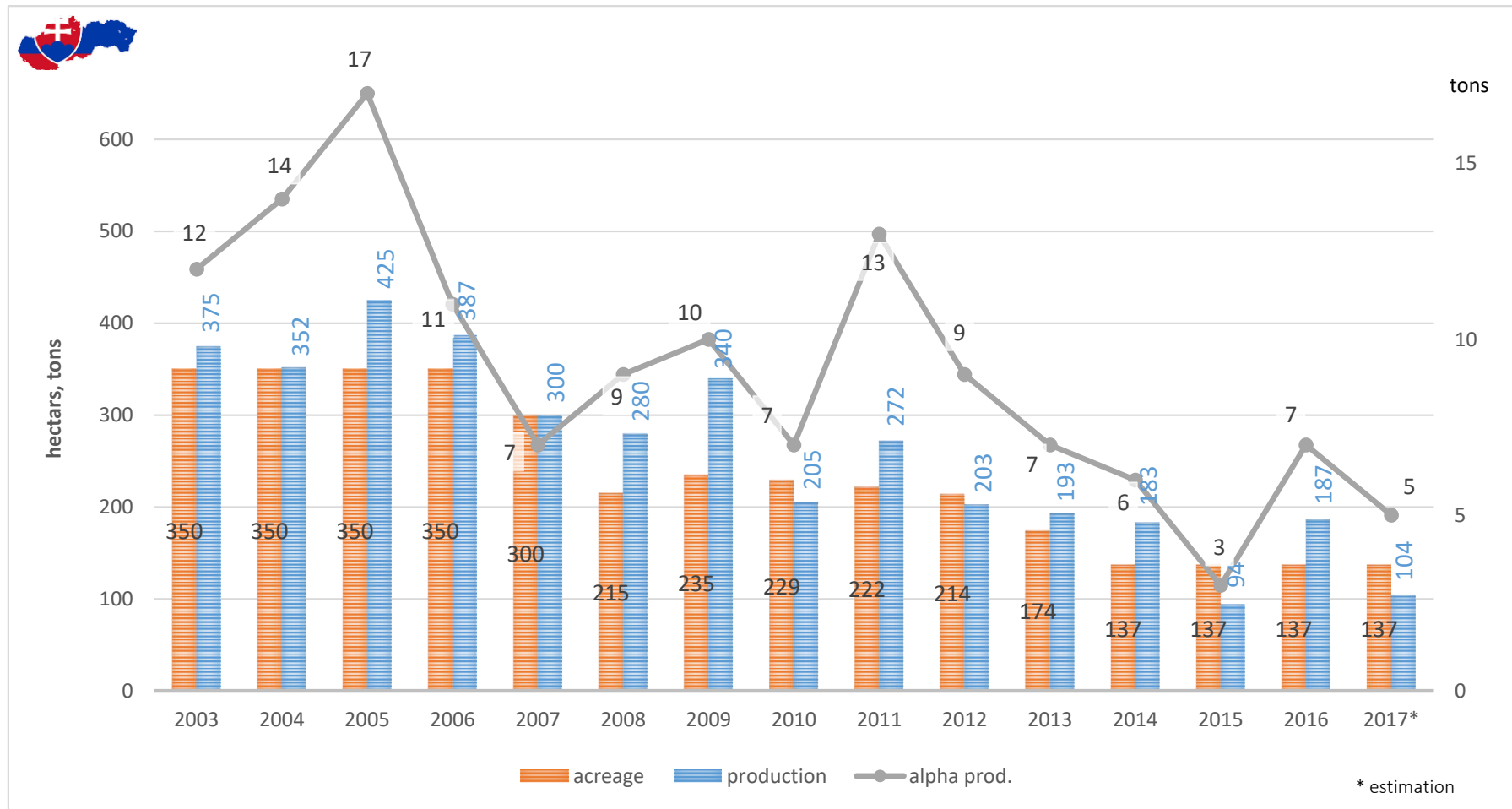


Figure 13: Slovenia hop crops 2003 - 2017*

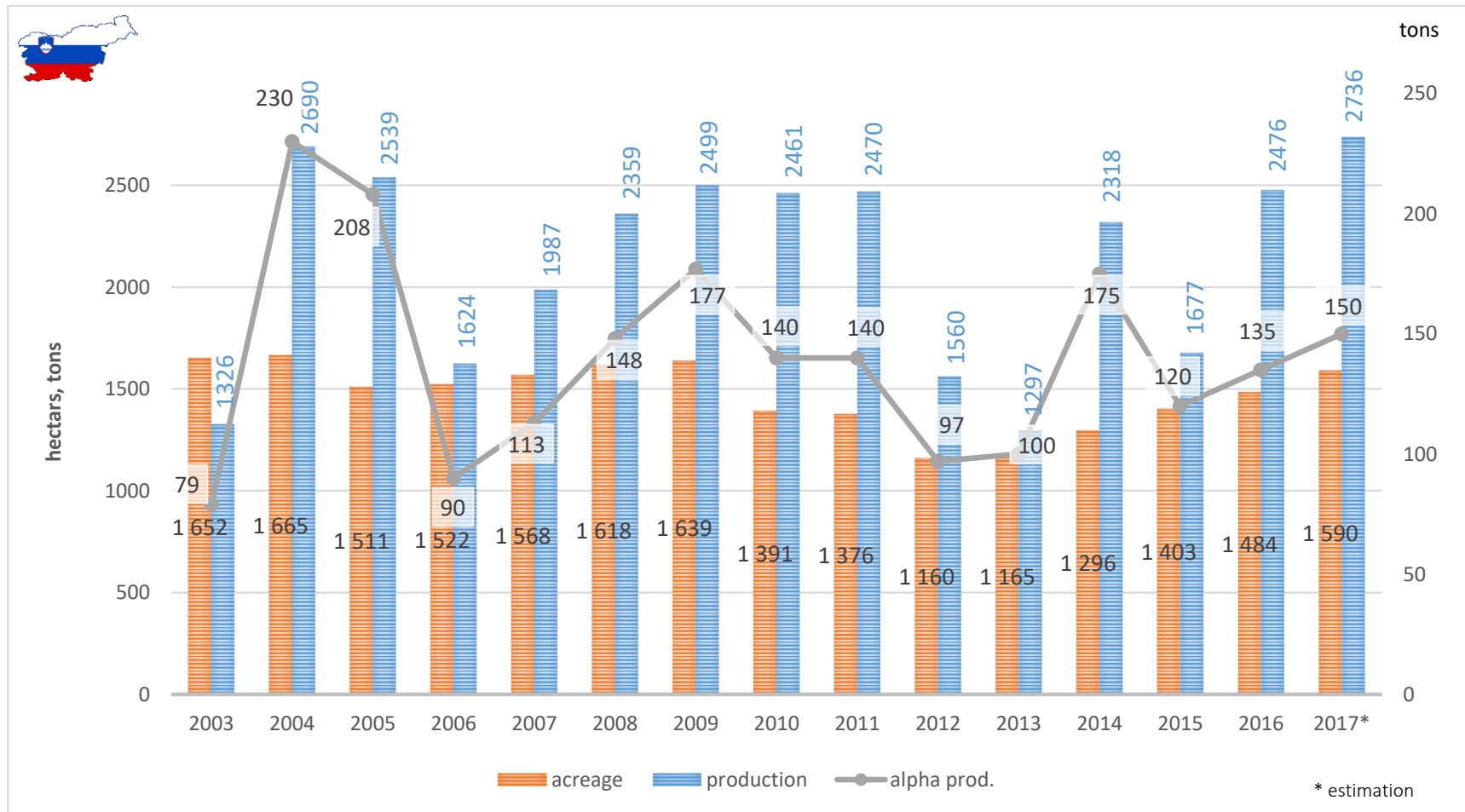


Figure 14: South Africa hop crops 2003 - 2018*

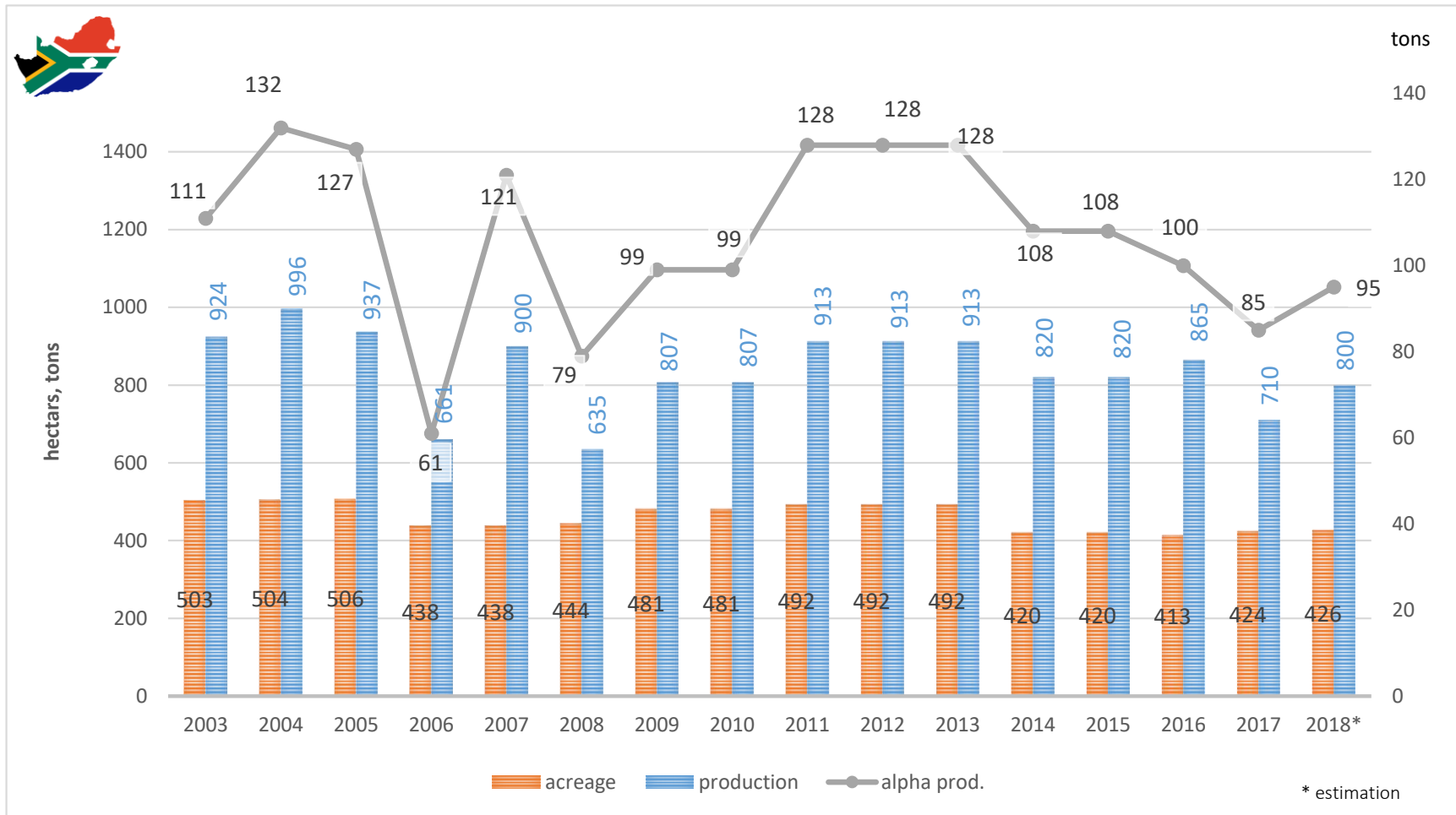


Figure 15: Spain hop crops 2003 - 2017*

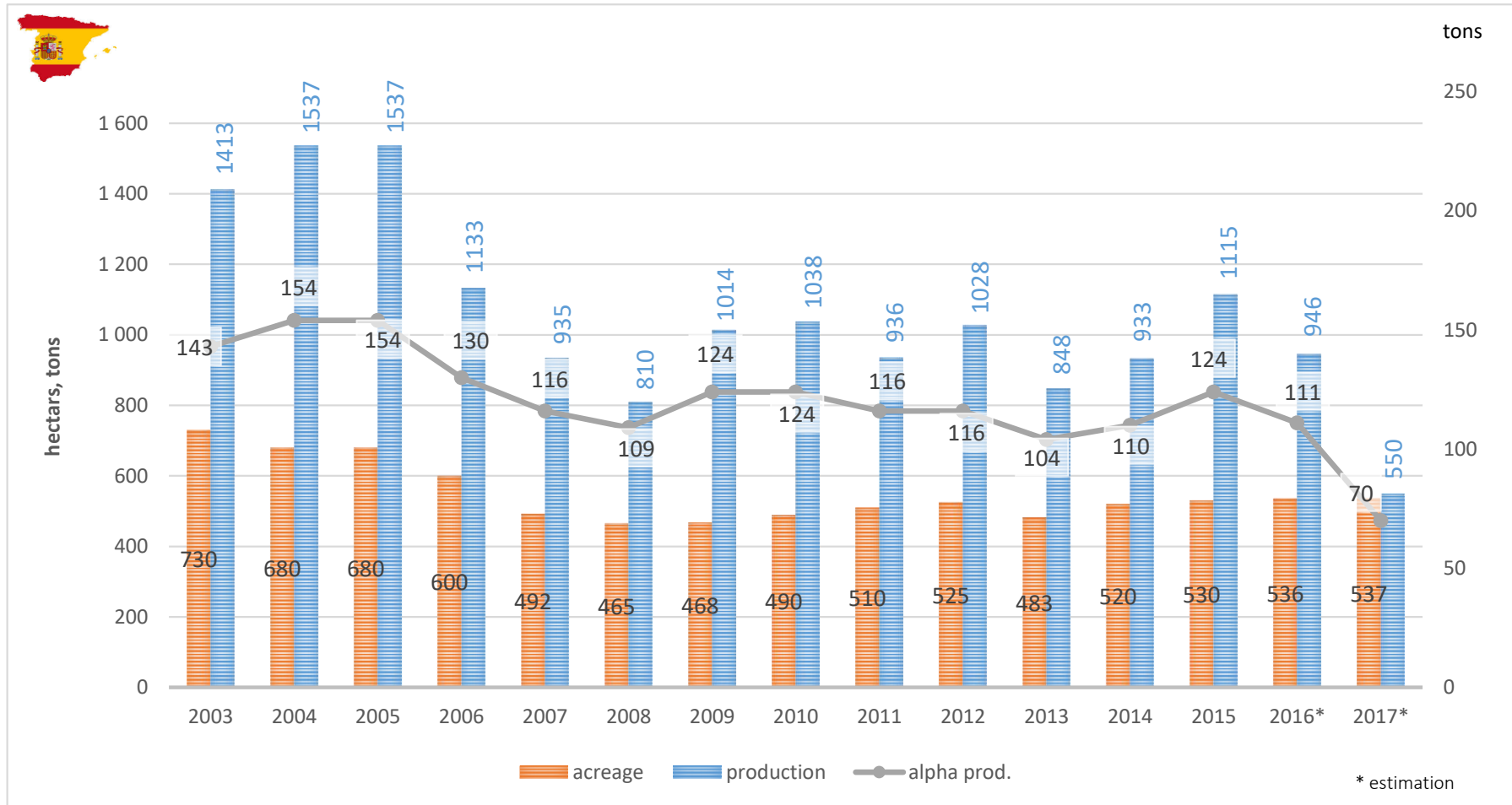


Figure 16: UK-England hop crops 2003 - 2017*

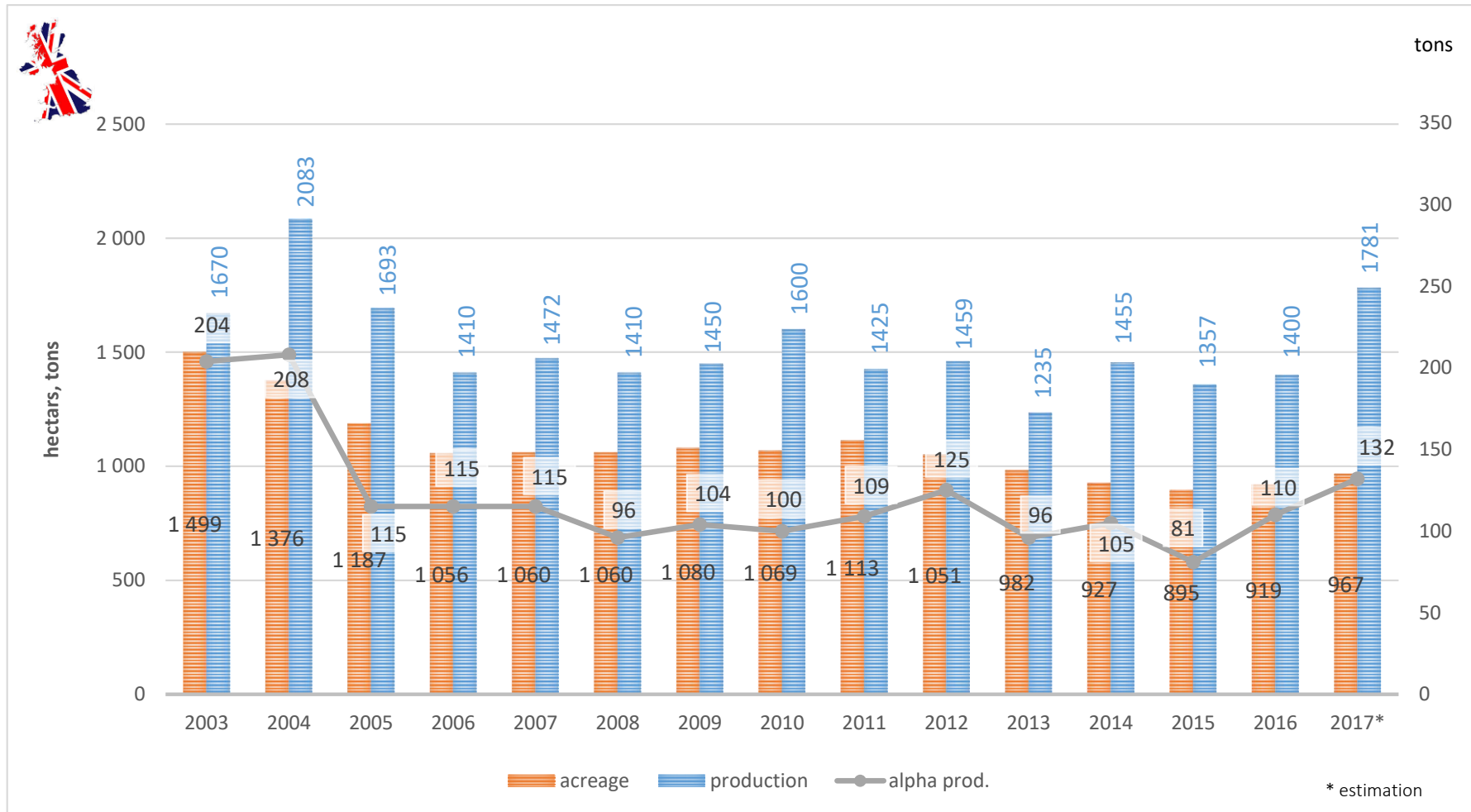


Figure 17: USA hop crops 2003 - 2017*

