

## CROP AND MARKET UPDATE &amp; HOP CROP 2017 ESTIMATE

## |HOP MARKET|

Growing Area	Variety	Quantities	Estimate	Changes	Ø Yields in	
		Crop 2016	Crop 2017		2016	2017
		mt	mt	± %	mt / ha	
Hallertau	<i>Hallertauer</i>	982.9	602.1	- 38.7	1.78	1.12
	<i>Hersbrucker</i>	1,914.0	1,627.4	- 15.0	2.05	1.79
	<i>Perle</i>	6,461.6	4,860.1	- 24.8	2.32	1.83
	<i>Spalter Select</i>	999.1	862.8	- 13.6	2.27	1.97
	<i>Tradition</i>	6,234.2	4,957.4	- 20.5	2.31	1.91
	<i>Saphir</i>	876.6	801.9	- 8.5	2.19	1.93
	<i>North Brewer</i>	304.7	231.8	- 23.9	1.94	1.43
	<i>Magnum</i>	3,254.9	2,809.7	- 13.7	2.13	2.03
	<i>Nugget</i>	320.9	261.9	- 18.4	2.49	2.20
	<i>Taurus</i>	753.6	519.8	- 31.0	2.22	1.93
	<i>Herkules</i>	13,019.3	14,029.3	7.8	2.87	2.60
	<i>Others</i>	1,831.7	2286.2	24.8	1.82	1.61
<b>Hallertau</b>		<b>36,953.5</b>	<b>33,850.4</b>	<b>- 8.4</b>	<b>2.38</b>	<b>2.08</b>
Elbe-Saale		2,845.4	2,673.0	- 6.1	2.02	1.82
Tettnang		2,194.2	1,975.0	- 10.0	1.71	1.46
Spalt		730.0	680.0	- 6.8	1.94	1.74
Bitburg		43.0	46.2	7.4	1.95	2.10
<b>Germany total</b>		<b>42,766.1</b>	<b>39,224.6</b>	<b>- 8.3</b>	<b>2.30</b>	<b>2.01</b>
Austria		480.0	410.0	- 14.6	1.93	1.60
Belgium		198.0	224.0	13.1	1.33	1.33
Bulgaria		38.0	45.0	18.4	2.11	2.05
Czech Rep.		7,711.6	5,700.0	- 26.1	1.61	1.15
England		1,400.0	1,500.0	7.1	1.52	1.53
France		772.0	755.0	- 2.2	1.68	1.57
Poland		3,043.0	2,500.0	- 17.8	2.06	1.55
Romania		195.0	219.0	12.3	0.72	0.81
Russia		444.0	500.0	12.6	1.06	1.06
Slovakia		187.0	160.0	- 14.4	1.36	1.17
Slovenia		2,476.0	2,500.0	1.0	1.67	1.57
Spain		946.0	662.0	- 30.0	1.76	1.23
Turkey		390.0	390.0	0.0	1.11	1.11
Ukraine		480.0	480.0	0.0	1.30	1.30
Rest		279.5	261.5	- 6.4	1.44	1.44
<b>Europe total</b>		<b>61,806.2</b>	<b>55,531.1</b>	<b>- 10.2</b>	<b>2.03</b>	<b>1.74</b>
	<i>Apollo</i>	943.7	1,190.0	26.1	2.40	2.79
	<i>Bravo</i>	855.8	800.0	- 6.5	2.92	3.04
	<i>Cascade</i>	5,816.1	5,910.0	1.6	1.90	1.95
	<i>Centennial</i>	3,085.2	3,010.0	- 2.4	1.50	1.49
	<i>Chinook</i>	1,317.1	1,710.0	29.8	1.68	1.95
	<i>Col./Tom./Zeus</i>	4,793.4	5,740.0	19.7	2.63	2.90
	<i>Nugget</i>	1,424.7	1,350.0	- 5.2	1.99	1.89
	<i>Summit</i>	1,322.0	1,750.0	32.4	8.64	9.56
	<i>Super Galena</i>	410.3	515.0	25.5	0.65	0.75
	<i>Willamette</i>	1,015.7	1,030.0	1.4	0.09	0.08
	<i>Others</i>	19,222.3	19,760.0	2.8	0.90	0.86
<b>USA total</b>		<b>40,206.3</b>	<b>42,765.0</b>	<b>6.4</b>	<b>1.88</b>	<b>1.86</b>
Argentina		300.0	300.0	0.0	1.54	0.48
Australia		1,104.8	1,438.0	30.2	2.02	9.34
Japan		300.0	300.0	0.0	1.95	0.68
New Zealand		794.0	760.0	- 4.3	1.93	0.31
P.R.China		4,500.0	5,290.0	17.6	1.79	12.48
South Africa		865.0	710.0	- 17.9	2.09	3.06
Rest		240.0	240.0	0.0	1.22	0.00
<b>World total</b>		<b>110,116.3</b>	<b>107,334.1</b>	<b>- 2.5</b>	<b>1.96</b>	<b>1.81</b>

On August 23<sup>rd</sup>, 2017 the estimate for the Hallertau was announced, meaning that crop 2017 estimates for all German hop growing areas have now been submitted.

A comparison of crop 2016 results with crop 2017 estimates for the main hop growing areas worldwide is enclosed.

As a result of unfavourable weather conditions, especially in the Hallertau during the growing period, we assume that alpha acid contents will probably be below average. Unfortunately it is still too early to give exact values.

We will keep you informed about the crop progress.

*Simon H. Steiner, Hopfen, GmbH*

*S.S. Steiner, Inc.*

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