

CROP AND MARKET UPDATE & HOP CROP 2020 ESTIMATE

| HOP MARKET |

Growing Area	Variety	Quantities	Estimate	Changes	Ø Yields in	
		Crop 2019	Crop 2020		mt / ha	
		mt	mt	± %	2019	2020
Hallertau	<i>Hallertauer</i>	763.9	745.1	- 2.5	1.51	1.49
	<i>Hersbrucker</i>	1,796.4	1,888.4	5.1	1.97	2.10
	<i>Perle</i>	5,882.4	5,674.4	- 3.5	2.12	1.97
	<i>Spalter Select</i>	971.7	968.7	- 0.3	1.99	1.97
	<i>Tradition</i>	5,117.8	5,265.3	2.9	1.94	1.94
	<i>Saphir</i>	868.6	760.9	- 12.4	2.12	2.06
	<i>North Brewer</i>	265.4	244.0	- 8.0	1.84	1.83
	<i>Magnum</i>	3,169.5	2,656.9	- 16.2	2.40	2.06
	<i>Nugget</i>	323.3	288.3	- 10.8	2.90	2.45
	<i>Taurus</i>	441.1	446.9	1.3	2.07	2.28
	<i>Herkules</i>	18,579.6	19,487.0	4.9	3.03	3.12
	<i>Others</i>	3,304.5	3,074.1	- 7.0	2.44	2.23
Hallertau		41,484.2	41,500.0	0.0	2.44	2.41
Elbe-Saale		3,326.8	3,652.0	9.8	2.15	2.34
Tettngang		2,909.8	2,840.0	- 2.4	2.02	1.92
Spalt		706.9	780.0	10.3	1.70	1.91
Bitburg		44.6	46.2	3.5	2.00	2.07
Germany total		48,472.3	48,818.2	0.7	2.37	2.36
Austria		455.0	492.0	8.1	1.81	1.94
Belgium		318.0	250.0	- 21.4	1.75	1.37
Bulgaria		51.9	50.0	- 3.6	1.41	1.54
Czech Rep.		7,145.0	6,400.0	- 10.4	1.43	1.29
England		1,430.0	1,400.0	- 2.1	1.49	1.55
France		822.0	825.0	0.4	1.65	1.63
Poland		3,765.5	3,835.0	1.8	2.14	2.05
Romania		195.0	260.0	33.3	0.75	0.99
Russia		350.0	350.0	0.0	1.38	1.38
Slovakia		110.0	42.0	- 61.8	0.83	1.11
Slovenia		2,600.0	2,400.0	- 7.7	1.63	1.62
Spain		840.0	830.0	- 1.2	1.58	1.49
Turkey		390.0	390.0	0.0	1.11	1.11
Ukraine		480.0	480.0	0.0	1.02	1.02
Rest		139.0	143.5	3.2	1.31	1.34
Europe total		67,563.7	66,965.7	- 0.9	2.06	2.03
USA (PNW)	<i>Amarillo®</i>	2,029.0	1,696.2	- 16.4	2.12	1.98
	<i>Apollo</i>	1,055.7	1,111.5	5.3	3.07	3.59
	<i>Bravo</i>	344.3	295.9	- 14.1	3.61	3.64
	<i>Cascade</i>	4,588.6	3,939.0	- 14.2	2.07	2.44
	<i>Centennial</i>	2,964.8	2,209.2	- 25.5	2.01	1.89
	<i>Chinook</i>	2,145.2	1,650.0	- 23.1	2.27	2.13
	<i>Citra®</i>	5,684.8	7,232.2	27.2	1.62	1.60
	<i>Col./Tom./Zeus</i>	7,916.9	8,164.7	3.1	2.99	3.21
	<i>Eureka!</i>	802.8	869.7	8.3	3.25	3.08
	<i>Mosaic®</i>	3,928.1	4,716.3	20.1	2.36	2.10
	<i>Super Galena</i>	707.2	761.6	7.7	3.17	3.34
	<i>Willamette</i>	808.3	964.1	19.3	1.89	2.45
	<i>Rest</i>	17,845.4	19,307.2	8.2	2.20	2.17
	<i>Other States</i>	815.0	453.6	- 44.3	0.85	0.48
USA total		51,636.1	53,371.2	3.4	2.17	2.14
Argentina		160.0	160.0	0.0	1.00	0.98
Australia		1,645.0	1,714.0	4.2	2.35	2.45
Japan		202.0	202.0	0.0	1.68	1.91
New Zealand		1,019.0	1,250.0	22.7	1.37	1.68
P.R.China		5,560.0	5,510.0	- 0.9	2.42	2.34
South Africa		754.0	754.0	0.0	1.77	1.77
Rest		669.0	669.0	0.0	1.40	1.40
World total		129,208.8	130,595.9	1.1	2.10	2.08

The crop estimate for the Hallertau was announced on August 25th, meaning that crop 2020 estimates have now been submitted for all German hop growing areas.

A comparison of the 2019 crop results with crop 2020 estimates for the main hop growing areas worldwide is enclosed.

In general we expect good yields and quality.

We will keep you informed about the crop progress.

Simon H. Steiner, Hopfen, GmbH
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