

CROP AND MARKET UPDATE & HOP CROP 2018 ESTIMATE

|HOP MARKET|

Growing Area	Variety	Quantities	Estimate	Changes	Ø Yields in	
		Crop 2017	Crop 2018		2017	2018
		mt	mt	± %	mt / ha	
Hallertau	Hallertauer	730.3	384.4	- 47.4	1.35	0.74
	Hersbrucker	1,806.2	1,596.3	- 11.6	1.98	1.74
	Perle	5,184.2	4,800.6	- 7.4	1.95	1.79
	Spalter Select	901.4	782.4	- 13.2	2.06	1.72
	Tradition	5,009.9	4,510.8	- 10.0	1.93	1.74
	Saphir	798.3	793.1	- 0.7	1.92	1.82
	North.Brewer	235.8	200.2	- 15.1	1.46	1.25
	Magnum	3,186.6	1,824.4	- 42.7	2.30	1.32
	Nugget	327.8	226.6	- 30.9	2.75	1.95
	Taurus	548.0	446.0	- 18.6	2.03	1.75
	Herkules	14,243.6	16,117.3	13.2	2.63	2.82
	Others	2568.3	2,818.1	9.7	1.81	1.96
	Hallertau		35,540.2	34,500.2	- 2.9	2.18
Elbe-Saale		2,938.8	2,846.6	- 3.1	2.00	1.87
Tettnang		2,270.4	2,195.0	- 3.3	1.68	1.56
Spalt		762.2	540.0	- 29.2	1.95	1.38
Bitburg		44.7	41.9	- 6.3	2.03	1.90
Germany total		41,556.3	40,123.7	- 3.4	2.13	2.01
Austria		439.0	445.0	1.4	1.71	1.77
Belgium		236.0	217.0	- 8.1	1.40	1.21
Bulgaria		62.0	62.0	0.0	2.82	1.68
Czech Rep.		6,797.0	4,900.0	- 27.9	1.37	0.97
England		1,780.0	1,600.0	- 10.1	1.82	1.65
France		763.0	833.0	9.2	1.59	1.68
Poland		2,993.0	2,530.0	- 15.5	1.85	1.61
Romania		205.0	195.0	- 4.9	0.76	0.72
Russia		500.0	500.0	0.0	1.06	0.93
Slovakia		104.0	152.0	46.2	0.76	1.10
Slovenia		2,736.0	2,900.0	6.0	1.72	1.74
Spain		550.0	960.0	74.5	1.02	1.79
Turkey		390.0	390.0	0.0	1.11	1.11
Ukraine		560.0	475.0	- 15.2	1.52	1.29
Rest		261.5	257.0	- 1.7	1.44	1.41
Europe total		59,932.8	56,539.7	- 5.7	1.88	1.74
Pacific North West total		47,339.7	47,938.0	1.3	2.16	2.16
Other States		850.5	790.0	- 7.1	0.84	0.85
USA total		48,190.2	48,728.0	1.1	2.10	2.10
Argentina		215.0	280.0	30.2	1.10	1.75
Australia		1,438.0	1,582.0	10.0	2.28	2.43
Japan		273.0	273.0	0.0	1.77	2.28
New Zealand		760.0	722.0	- 5.0	1.72	1.36
P.R.China		5,530.0	5,013.0	- 9.3	2.41	2.20
South Africa		710.0	754.0	6.2	1.67	1.77
Rest		669.0	669.0	0.0	2.90	1.40
World total		117,718.0	114,560.7	- 2.7	1.99	1.90

The crop estimate for the Hallertau was announced on August 23rd, meaning that crop 2018 estimates have now been submitted for all German hop growing areas.

A comparison of the 2017 crop results with crop 2018 estimates for the main hop growing areas worldwide is enclosed.

As a result of extreme weather conditions 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.

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