

POSSIBLE TRENDS IN THE US CRAFT MARKET | HOP MARKET |

So many things are different this year and so are our guidelines. The importance of craft beers for the hop market is very high due to the high use of hop products in the production of these beers. For this reason, in order to assess the market situation and calculate the average alpha acid addition, we have placed special emphasis on estimating the development of craft beer output in the USA. Our US team has prepared the following assessment.

WORLD HOP ACID SUPPLY AND DEMAND 2013 – 2020 IN THREE SCENARIOS

Craft Barrels	Scenarios				Growth Assumptions +/- %		
	2019 actual	2020 probable	2020 worst	2020 best	2020 probable	2020 worst	2020 best
Contract	306,957	306,957	291,609	322,305	+ 0.0	- 5.0	+ 5.0
Regional	17,918,642	18,366,608	17,022,710	18,814,574	+ 3.0	- 5.0	+ 5.0
Microbrewery	4,888,669	4,888,669	4,399,802	5,133,102	+ 0.0	- 10.0	+ 5.0
Taproom	1,615,881	1,454,293	1,292,705	1,535,087	- 10.0	- 20.0	- 5.0
Brewpub	1,617,768	1,375,103	1,213,326	1,455,991	- 15.0	- 25.0	- 10.0
Non-BA Craft	2,900,000	3,045,000	2,755,000	3,335,000	+ 5.0	- 5.0	+ 15.0
Total Craft Barrels	29,247,917	29,436,630	26,975,152	30,596,060			
YOY Change		+ 0.6 %	- 7.8 %	+ 4.6 %			

	Production (mt Alpha)	Beer Production (Mio hl)	Alpha Dosage (g Alpha/hl)	Alpha Usage (mt Alpha)	Annual Balance (mt Alpha)	
2013	7,211	2014	1,957	4.4	8,611	- 1,400
2014	8,350	2015	1,967	4.5	8,852	- 502
2015	6,838	2016	1,961	4.5	8,825	- 1,987
2016	9,373	2017	1,945	4.6	8,947	426
2017	9,901	2018	1,904	4.7	8,949	952
2018	10,123	2019	1,912	4.9	9,266	857
2019	11,316	2020*	1,747	5.0	8,735	2,581
2020*	11,369 probable	2021*	1,739	5.0	8,695	2,674
2020*	11,369 worst	2021*	1,589	5.0	7,945	3,424
2020*	11,369 best	2021*	1,884	5.0	9,420	1,949

[Please find here our complete Guidelines for hop buying.](#)

If you need any further information, please feel free to contact us directly (info@hopsteiner.de)

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