



Crop and Market Update

Mainburg, August 2011

Dear Business Partners,

the last outstanding official 2011 crop estimate figures for German growing areas, namely those for the Hallertau, were published on August 18th. We are pleased to attach a list comparing the crop results for 2010 with the estimates for 2011 for the world's main growing areas.

Overall we expect yields and quality to be good. Of course acreage reduction of approximately 1800 ha worldwide for crop 2011 compared with crop 2010 is reflected by the crop sizes. No general supply problems are anticipated at this time.

We will keep you informed about further developments.

Best regards

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Hop Crop 2011 - Estimate

Growing Area	Variety	Quantities	Estimate	Changes	
		Crop 2010	Crop 2011	2010/2011	
		mt	mt	± mt	± %
Hallertau	Hallertauer	1.049	863	-185,8	-17,7
	Hersbrucker	1.178	1.399	220,9	18,7
	Perle	5.464	5.981	516,6	9,5
	Select	1.287	1.218	-69,4	-5,4
	Saphir	373	384	11,5	3,1
	Tradition	4.254	5.059	805,3	18,9
	Other Aroma	115	131	15,9	13,8
	Aroma Total	13.721	15.036	1.315,1	9,6
	North. Brew.	414	381	-33,0	-8,0
	Herkules	5.895	7.112	1.216,7	20,6
Magnum	6.633	6.025	-608,5	-9,2	
Nugget	495	453	-42,4	-8,6	
Taurus	1.763	1.929	165,7	9,4	
Other Bitter	208	215	7,4	3,6	
Bitter Total	15.408	16.114	705,8	4,6	
Hallertau Total	29.129	31.150	2.020,8	6,9	
Elbe-Saale		2.631	2.680	49,0	1,9
Tettngang		1.799	1.910	111,1	6,2
Spalt		641	680	38,9	6,1
Rest Germany		33	39	5,6	16,9
Germany Total		34.233	36.459	2.225,4	6,5
USA	Apollo	1.043	1.270	227,0	21,8
	Cascade	1.814	1.814	0,0	0,0
	Col./Tom./Zeus	8.936	8.255	-681,0	-7,6
	Galena	1.814	1.179	-635,0	-35,0
	Nugget	2.087	2.087	0,0	0,0
	Summit	4.627	2.449	-2.178,0	-47,1
	Super Galena	1.043	1.315	272,0	26,1
	Willamette	2.268	1.225	-1.043,0	-46,0
	Others	6.075	9.537	3.462,0	57,0
USA Total	29.707	29.131	-576,0	-1,9	
China		10.150	10.230	80,0	0,8
Czech Republic		7.772	6.190	-1.582,0	-20,4
Poland		2.668	2.268	-400,0	-15,0
Slovenia		2.400	2.200	-200,0	-8,3
England		1.608	1.600	-8,0	-0,5
France		790	743	-47,0	-5,9
Spain		1.037	1.037	0,0	0,0
Australia		1.099	1.044	-55,0	-5,0
New Zealand		793	573	-220,0	-27,7
South Africa		913	913	0,0	0,0
Austria		368	385	17,0	4,6
Other Countries*		3.142	3.181	39,0	1,2
WORLD TOTAL		96.680	95.954	-726,6	-0,8

*Belgium, Bulgaria, Slovakia, Rumania, Russia, Turkey, Ukraine, Portugal, Serbia, Belarus, Croatia, Suisse, Hungary, Argentina, Japan, India