

CROP & MARKET UPDATE 08/2014

Crop and Market Update & Hop Crop 2014 Estimate

| Growing Area | Variety | Quantities | Estimate | Changes | |
|----------------------|----------------|-----------------|------------------|----------------|-------------|
| | | Crop 2013 | Crop 2014 | 2013/2014 | 2013/2014 |
| | | mt | mt | ± mt | ± % |
| Hallertau | Hallertauer | 699.9 | 785.7 | 85.8 | 12.3 |
| | Hersbrucker | 1,112.8 | 1,713.0 | 600.2 | 53.9 |
| | Perle | 3,901.5 | 5,826.2 | 1,924.7 | 49.3 |
| | Spalter Select | 638.5 | 888.0 | 249.5 | 39.1 |
| | Tradition | 3,353.9 | 5,133.6 | 1,779.7 | 53.1 |
| | Saphir | 359.7 | 766.1 | 406.3 | 113.0 |
| | North. Brewer | 208.0 | 265.1 | 57.0 | 27.4 |
| | Magnum | 4,778.3 | 3,841.6 | -936.7 | -19.6 |
| | Nugget | 298.8 | 323.3 | 24.5 | 8.2 |
| | Taurus | 1,088.7 | 1,028.9 | -59.9 | -5.5 |
| | Herkules | 6,376.4 | 9,340.3 | 2,963.9 | 46.5 |
| | Others | 261.2 | 588.5 | 327.3 | 125.3 |
| Hallertau | | 23,077.7 | 30,500.00 | 7,422.3 | 32.2 |
| Elbe-Saale | | 2,508.6 | 2,442.5 | -66.1 | -2.6 |
| Tettngang | | 1,429.7 | 1,835.0 | 405.3 | 28.3 |
| Spalt | | 499.7 | 565.0 | 65.4 | 13.1 |
| Bitburg | | 38.5 | 44.2 | 5.7 | 14.9 |
| Germany Total | | 27,554.1 | 35,386.70 | 7,832.6 | 28.4 |
| Austria | | 410.0 | 414.0 | 4.0 | 1.0 |
| Belgium | | 205.0 | 148.0 | -57.0 | -27.8 |
| Bulgaria | | 180.0 | 180.0 | 0.0 | 0.0 |
| Czech Rep. | | 5,329.8 | 5,500.0 | 170.3 | 3.2 |
| England | | 1,459.0 | 1,235.0 | -224.0 | -15.4 |
| France | | 644.0 | 690.0 | 46.0 | 7.1 |
| Poland | | 2,250.7 | 2,079.0 | -171.7 | -7.6 |
| Romania | | 181.0 | 185.0 | 4.0 | 2.2 |
| Russia | | 162.0 | 162.0 | 0.0 | 0.0 |
| Slovakia | | 175.0 | 150.0 | -25.0 | -14.3 |
| Slovenia | | 1,600.0 | 1,900.0 | 300.0 | 18.8 |
| Spain | | 854.0 | 960.0 | 106.0 | 12.4 |
| Turkey | | 390.0 | 390.0 | 0.0 | 0.0 |
| Ukraine | | 520.0 | 310.0 | -210.0 | -40.4 |
| Rest* | | 302.0 | 302.0 | 0.0 | 0.0 |
| Europe Total | | 42,216.6 | 49,991.7 | 7,775.1 | 18.4 |
| | Apollo | 1,222.3 | 1,225.0 | 2.7 | 0.2 |
| | Bravo | 805.6 | 907.0 | 101.4 | 12.6 |
| | Cascade | 3,944.4 | 4,944.0 | 999.6 | 25.3 |
| | Centennial | 1,497.0 | 1,996.0 | 499.0 | 33.3 |
| | Chinook | 1,540.3 | 1,451.0 | -89.3 | -5.8 |
| | Col./Tom./Zeus | 7,852.8 | 7,257.0 | -595.8 | -7.6 |
| | Galena | 392.9 | 249.0 | -143.9 | -36.6 |
| | Nugget | 1,898.2 | 1,542.0 | -356.2 | -18.8 |
| | Summit | 2,416.1 | 2,722.0 | 305.9 | 12.7 |
| | Super Galena | 1,461.7 | 1,134.0 | -327.7 | -22.4 |
| | Willamette | 667.6 | 726.0 | 58.4 | 8.7 |
| | Others | 7,755.0 | 8,619.0 | 864.0 | 11.1 |
| USA Total | | 31,453.9 | 32,772.0 | 1,318.1 | 4.2 |
| Argentina | | 300.0 | 300.0 | 0.0 | 0.0 |
| Australia | | 1,146.0 | 1,079.0 | -67.0 | -5.8 |
| Japan | | 335.0 | 335.0 | 0.0 | 0.0 |
| New Zealand | | 703.0 | 765.0 | 62.0 | 8.8 |
| P.R. China | | 6,230.0 | 6,840.0 | 610.0 | 9.8 |
| South Africa | | 913.0 | 820.0 | -93.0 | -10.2 |
| Rest | | 40.0 | 40.0 | 0.0 | 0.0 |
| World Total | | 83,337.5 | 92,942.7 | 9,605.2 | 11.5 |

Estimates for the 2014 hop crop in Germany were finalized in the Hallertau on August 20th. We are pleased to attach a list comparing the crop results for 2013 with the estimates for 2014 for the world's main growing areas.

Overall we expect yields and quality to be average to good. A small increase in acreage just under 4 % worldwide compared with crop 2013 will also be reflected by the crop volumes.

We will keep you informed about further developments.

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