

2017
HOPSTEINER – NEWSLETTER
DRINKTEC

	World Hop Acreage	World Hop Crop	World Beer Production	World Alpha Acids Production	World Alpha Acids Demand
	(ha)	(mt)	(Mio. hl)	(mt)	(mt)
2015	51,640	87,358	1,967,1	6,838	8,852
	+ 7.5 %	- 9.6 %	+ 0.5 %	- 18.1 %	+ 2.8 %
2016	56,260	110,496	1,960,0	9,036	8,802
	+ 8.9 %	+ 26.5 %	- 0.4 %	+ 32.2 %	- 0.6 %
2017	59,252	109,375*	1,964,0*	8,764*	9,034*
	+ 5.3 %	- 1.0 %*	+ 0.2 %*	- 4.2 %*	+ 2.6 %*
2018	–	–	1,960,0*	–	9,016*
	–	–	- 0.2 %*	–	- 0.2 %*

*Estimate

Foreword

” At the present time the harvest of the 2017 hop crop is not yet completed. In order to have some preliminary information available at Drinktec 2017, we have decided to publish an abbreviated version of our Guidelines for Hop Buying. Although the alpha values, which are necessary for the calculation of the world’s total alpha supply, are not yet fully available, we are sure that this shortened version of the Guidelines will give you a useful first impression of the 2017 hop market. As soon as we have more reliable data on this year’s alpha values, we will publish our Guidelines for Hop Buying in full as in previous years. We wish you a pleasant and interesting Drinktec 2017.

September 2017
S. S. Steiner, Inc.
Simon H. Steiner, Hopfen, GmbH
Steiner Hops Limited

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International Conversion Table

1 metr. ton (mt)	→ 1,000 kg	→ 2,204.6 lbs.
100 lbs.	→ 45.359 kg	
1 hectare (ha)	→ 2.471 acres	
1 acre	→ 0.405 hectare (ha)	
1 hectolitre (hl)	→ 100 litres (Ltr.)	→ 0.8523 bbl. [USA] → 0.6114 bbl. [Brit.]
1 bbl. [USA]	→ 117.34 litres (Ltr.)	→ 1.1734 hectolitres (hl)
1 bbl. [Brit.]	→ 163.65 litres (Ltr.)	→ 1.6365 hectolitres (hl)

Crop Quantities and Average Yields 2014 – 2017

	Crop Quantities in mt				+/- %			Ø Yields in mt / ha			
	2014	2015	2016	2017*	14/15	15/16	16/17*	2014	2015	2016	2017*
Hallertauer	1,026.7	618.6	982.9	602.1	- 39.7	+ 58.9	- 38.7	1.65	1.11	1.78	1.12
Hersbrucker	1,900.6	1,361.7	1,914.0	1,627.4	- 28.4	+ 40.6	- 15.0	2.07	1.43	2.05	1.79
Perle	6,103.0	3,917.8	6,461.6	4,860.1	- 35.8	+ 64.9	- 24.8	2.14	1.37	2.32	1.83
Spalter Select	957.2	625.8	999.1	862.8	- 34.6	+ 59.7	- 13.6	2.21	1.41	2.27	1.97
Tradition	5,521.4	3,882.8	6,234.2	4,957.4	- 29.7	+ 60.6	- 20.5	2.05	1.39	2.31	1.91
Saphir	734.3	541.6	876.6	801.9	- 26.2	+ 61.9	- 8.5	2.04	1.40	2.19	1.93
Northern Brewer	349.7	180.2	304.7	231.8	- 48.5	+ 69.1	- 23.9	2.02	1.20	1.94	1.43
Magnum	4,029.2	2,892.0	3,254.9	2,809.7	- 28.2	+ 12.5	- 13.7	2.08	1.73	2.13	2.03
Nugget	373.7	249.3	320.9	261.9	- 33.3	+ 28.7	- 18.4	2.58	1.82	2.49	2.20
Taurus	1,253.7	685.4	753.6	519.8	- 45.3	+ 10.0	- 31.0	2.22	1.56	2.22	1.93
Herkules	10,290.7	8,062.3	13,019.3	14,029.3	- 21.7	+ 61.5	+ 7.8	3.08	2.10	2.87	2.60
Others	632.9	856.6	1,831.7	2,286.2	+ 35.3	+ 113.8	24.8	1.52	1.26	1.82	1.61
Hallertau	33,173.1	23,874.1	36,953.5	33,850.4	- 28.0	+ 54.8	- 8.4	2.29	1.60	2.38	2.08
Elbe-Saale	2,567.9	2,355.3	2,845.4	2,673.0	- 8.3	+ 20.8	- 6.1	2.03	1.78	2.02	1.82
Tettngang	2,022.4	1,694.9	2,194.2	1,975.0	- 16.2	+ 29.5	- 10.0	1.67	1.37	1.71	1.46
Spalt	688.7	376.6	730.0	680.0	- 45.3	+ 93.8	- 6.8	1.98	1.06	1.94	1.74
Rest	47.7	35.8	43.0	46.2	- 24.9	+ 20.1	+ 7.4	2.51	1.79	1.95	2.10
Germany total	38,499.8	28,336.7	42,766.1	39,224.6	- 26.4	+ 50.9	- 8.3	2.22	1.59	2.30	2.01
Austria	491.0	298.0	480.0	410.0	- 39.3	+ 61.1	- 14.6	1.99	1.20	1.93	1.60
Belgium	187.0	187.0	198.0	224.0	+ 0.0	+ 5.9	+ 13.1	1.26	1.26	1.33	1.33
Bulgaria	30.0	26.0	38.0	45.0	- 13.3	+ 46.2	+ 18.4	2.14	1.86	2.11	2.05
Czechia	6,202.0	4,842.6	7,711.6	5,700.0	- 21.9	+ 59.2	- 26.1	1.39	1.05	1.61	1.15
England	1,455.0	1,357.0	1,400.0	1,500.0	- 6.7	+ 3.2	+ 7.1	1.38	1.52	1.52	1.53
France	636.0	555.0	772.0	755.0	- 12.7	+ 39.1	- 2.2	1.48	1.26	1.68	1.57
Poland	2,072.3	2,242.0	3,043.0	2,500.0	+ 8.2	+ 35.7	- 17.8	1.47	1.57	2.06	1.55
Romania	172.0	195.0	195.0	219.0	+ 13.4	+ 0.0	+ 12.3	0.69	0.72	0.72	0.81
Russia	162.0	162.0	444.0	500.0	+ 0.0	+ 174.1	+ 12.6	1.03	0.74	1.06	1.06
Slovakia	183.0	94.0	187.0	160.0	- 48.6	+ 98.9	- 14.4	1.34	0.69	1.36	1.17
Slovenia	2,318.8	1,677.6	2,476.0	2,500.0	- 27.7	+ 47.6	+ 1.0	1.79	1.20	1.67	1.57
Spain	933.0	1,115.0	946.0	495.0	+ 19.5	- 15.2	- 47.7	1.79	2.09	1.76	0.92
Turkey	390.0	390.0	390.0	390.0	+ 0.0	+ 0.0	+ 0.0	1.11	1.11	1.11	1.11
Ukraine	436.0	480.0	480.0	480.0	+ 10.1	+ 0.0	+ 0.0	1.20	1.30	1.30	1.30
Rest	294.7	296.0	279.5	261.5	+ 0.4	- 5.6	- 6.4	1.51	1.53	1.44	1.44
Europe total	54,462.6	42,253.9	61,806.2	55,363.7	- 22.4	+ 46.3	- 10.4	1.92	1.45	2.03	1.73
Apollo	1,100.1	1,146.8	943.7	1,080.0	+ 4.2	- 17.7	+ 14.4	2.76	2.85	2.40	2.54
Bravo	880.7	926.4	855.8	755.0	+ 5.2	- 7.6	- 11.8	3.07	3.12	2.92	2.87
Cascade	5,262.4	5,885.0	5,816.1	5,763.0	+ 11.8	- 1.2	- 0.9	1.96	2.14	1.90	1.90
Centennial	1,977.6	2,345.4	3,085.2	3,506.0	+ 18.6	+ 31.5	+ 13.6	1.46	1.24	1.50	1.73
Chinook	1,328.9	1,466.6	1,317.1	1,956.0	+ 10.4	- 10.2	+ 48.5	2.00	2.03	1.68	2.23
Col./Tom./Zeus	7,244.6	6,610.0	4,793.4	5,730.0	- 8.8	- 27.5	+ 19.5	3.10	3.07	2.63	2.89
Nugget	1,413.4	1,399.6	1,424.7	1,287.0	- 1.0	+ 1.8	- 9.7	2.14	2.05	2.14	2.01
Summit	2,407.8	1,446.8	1,322.0	1,529.0	- 39.9	- 8.6	+ 15.7	2.36	2.21	1.85	2.14
Super Galena	993.1	612.9	410.3	573.0	- 38.3	- 33.1	+ 39.7	2.75	2.88	2.68	3.13
Willamette	676.8	686.5	1,015.7	1,021.0	+ 1.4	+ 48.0	+ 0.5	1.44	1.25	1.61	1.49
Rest	8,918.0	13,238.2	19,222.3	21,533.0	+ 48.4	+ 45.2	+ 12.0	1.73	1.69	1.77	1.77
USA total	32,203.4	35,764.2	40,206.3	44,733.0	+ 11.1	+ 12.4	+ 11.3	2.09	1.97	1.88	1.95
Argentina	300.0	300.0	300.0	300.0	+ 0.0	+ 0.0	+ 0.0	1.54	1.54	1.54	1.54
Australia	1,079.0	1,200.5	1,104.8	1,438.0	+ 11.3	- 8.0	+ 30.2	2.64	2.46	2.02	2.28
Japan	300.0	300.0	300.0	300.0	+ 0.0	+ 0.0	+ 0.0	1.95	1.95	1.95	1.95
New Zealand	765.0	740.0	794.0	760.0	- 3.3	+ 7.3	- 4.3	2.07	1.91	1.93	1.72
P.R.China	6,700.0	5,790.0	4,880.0	5,530.0	- 13.6	- 15.7	+ 13.3	2.48	2.25	1.95	2.29
South Africa	820.0	769.4	865.0	710.0	- 6.2	+ 12.4	- 17.9	1.95	1.91	2.09	1.67
Rest	40.0	240.0	240.0	240.0	+ 500.0	+ 0.0	+ 0.0	0.67	1.46	1.22	1.03
World total	96,670.0	87,358.0	110,496.3	109,374.7	- 9.6	+ 26.5	- 1.0	2.01	1.69	1.96	1.84

*Estimate

World Alpha Acids Production 2014 – 2017

Total Crop Quantities in mt					% share			
	2014	2015	2016	2017*	2014	2015	2016	2017*
Aroma Varieties	48,529	45,361	67,232	66,281	50.2	51.9	60.8	60.6
Bitter Varieties	48,141	41,997	43,264	43,094	49.8	48.1	39.2	39.4
Total	96,670	87,358	110,496	109,375	100.0	100.0	100.0	100.0

Alpha Amount in kg					Alpha Content in %			
	2014	2015	2016	2017*	2014	2015	2016	2017*
Aroma Varieties	2,465,900	2,247,700	3,360,200	3,577,200	5.1	5.0	5.0	5.4
Bitter Varieties	5,883,800	4,589,900	5,676,200	5,186,500	12.2	10.9	13.1	12.0
Total	8,349,700	6,837,600	9,036,400	8,763,700	8.6	7.8	8.2	8.0

World Hop Acid Supply and Demand 2010 – 2017

	Production	Beer Production	Alpha Dosage	Alpha Usage	Annual Balance	
	(mt Alpha)	(Mio hl)	(g Alpha/hl)	(mt Alpha)	(mt Alpha)	
2010	8,192	2011	1,917	4.0	7,668	524
2011	9,560	2012	1,941	4.2	8,152	1,408
2012	7,955	2013	1,962	4.2	8,240	- 285
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	1,960	4.5	8,802	- 1,964
2016	9,036	2017*	1,964	4.6	9,034	2
2017*	8,764	2018*	1,960	4.6	9,016	-252

*Estimate