

CROP AND MARKET UPDATE & HOP CROP 2019 ESTIMATE

|HOP MARKET|

Growing Area	Variety	Quantities	Estimate	Changes	Ø Yields in	
		Crop 2018	Crop 2019		2018	2019
		mt	mt	± %	mt / ha	
Hallertau	<i>Hallertauer</i>	456.2	761.6	66.9	0.91	1.51
	<i>Hersbrucker</i>	1,914.6	1,757.4	-8.2	2.09	1.93
	<i>Perle</i>	4,954.8	5,197.1	4.9	1.85	1.87
	<i>Spalter Select</i>	882.7	938.4	6.3	1.89	1.92
	<i>Tradition</i>	5,132.0	5,056.7	-1.5	1.99	1.92
	<i>Saphir</i>	829.6	868.4	4.7	1.91	2.12
	<i>North.Brewer</i>	203.7	236.1	15.9	1.31	1.63
	<i>Magnum</i>	2,100.2	2,742.8	30.6	1.54	2.08
	<i>Nugget</i>	277.2	271.8	-1.9	2.39	2.44
	<i>Taurus</i>	498.0	438.4	-12.0	2.04	2.06
	<i>Herkules</i>	16,282.5	18,049.5	10.9	2.76	2.95
	<i>Others</i>	3,023.4	3,081.9	1.9	2.13	2.28
Hallertau		36,554.8	39,400.0	7.8	2.18	2.32
Elbe-Saale		2,488.5	3,214.0	29.2	1.61	2.08
Tettngang		2,075.1	2,572.0	23.9	1.49	1.79
Spalt		631.3	618.0	-2.1	1.56	1.49
Bitburg		44.6	46.0	3.1	1.99	2.05
Germany total		41,794.3	45,850.0	9.7	2.07	2.25
Austria		450.0	455.0	1.1	1.80	1.81
Belgium		282.0	318.0	12.8	1.54	1.75
Bulgaria		53.5	53.5	0.0	1.45	1.45
Czech Rep.		5,126.4	6,300.0	22.9	1.02	1.26
England		1,377.0	1,430.0	3.8	1.45	1.50
France		864.0	877.0	1.5	1.74	1.76
Poland		3,208.0	2,900.0	-9.6	1.93	1.74
Romania		215.0	255.0	18.6	0.78	0.91
Russia		330.0	350.0	6.1	1.31	1.38
Slovakia		127.0	105.0	-17.3	0.93	0.77
Slovenia		3,078.0	2,500.0	-18.8	1.85	1.53
Spain		900.0	900.0	0.0	1.68	1.69
Turkey		390.0	390.0	0.0	1.11	1.11
Ukraine		480.0	480.0	0.0	1.30	1.02
Rest		139.0	139.0	0.0	1.25	1.31
Europe total		58,814.2	63,302.5	7.6	1.81	1.93
USA	<i>Apollo</i>	1,232.3	1,220.0	-1.0	2.97	2.79
	<i>Bravo</i>	501.6	363.0	-27.6	3.38	3.08
	<i>Cascade</i>	5,257.1	4,395.0	-16.4	2.10	2.06
	<i>Centennial</i>	2,801.8	2,448.0	-12.6	1.51	1.57
	<i>Chinook</i>	2,390.0	1,871.0	-21.7	2.09	1.95
	<i>Col./Tom./Zeus</i>	7,244.6	7,776.0	7.3	2.92	2.98
	<i>Eureka</i>	686.7	706.0	2.8	2.14	2.12
	<i>Nugget</i>	1,239.3	1,011.0	-18.4	2.05	2.15
	<i>Super Galena</i>	889.9	723.0	-18.8	3.29	2.92
	<i>Willamette</i>	846.5	584.0	-31.0	1.62	1.30
	<i>Rest</i>	25,402.3	27,152.0	6.9	2.09	2.04
	<i>Others</i>	790.0	815.0	3.2	0.85	0.85
USA total		49,282.1	49,064.0	-0.4	2.12	2.08
Argentina		280.0	160.0	-42.9	1.75	1.00
Australia		1,582.0	1,645.0	4.0	2.43	2.35
Japan		202.0	202.0	0.0	1.68	1.68
New Zealand		794.0	1,019.0	28.3	1.50	1.46
P.R.China		5,610.0	5,380.0	-4.1	2.44	2.44
South Africa		754.0	754.0	0.0	1.77	1.77
Rest		669.0	669.0	0.0	1.96	2.00
World total		117,987.3	122,195.5	3.6	1.99	1.90

The crop estimate for the Hallertau was announced on August 21st, meaning that crop 2019 estimates have now been submitted for all German hop growing areas.

A comparison of the 2018 crop results with crop 2019 estimates for the main hop growing areas worldwide is enclosed.

It is too early to say how the weather conditions, especially the very dry July, may have affected the alpha-acids in German hops.

We will keep you informed about the crop progress.

Simon H. Steiner Hopfen GmbH

S.S. Steiner Inc.

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