

# GUIDELINES FOR HOP BUYING 2022

| HOP MARKET |

For many years the brewing and hop industries have been diligently working towards improving the sustainability aspects of our entire production chain. One important area of greatly improved sustainability for Hopsteiner is our hop breeding program. Our work in this area has been prescient, given the disappointing results of crop 2022 both in Europe and the United States.

The poor crops serve as a stark reminder of the importance of breeding hop varieties with greater drought, heat and disease tolerance. Many traditional hop varieties experienced lower yields and quality dam-

age compared to newer, more technically advanced varieties. This was the case in the main hop growing countries, as heat and drought impacted Germany and the Czech Republic while a late-arriving summer made for a similar yield reduction in USA. In extreme cases in Europe, yields and alphas were down by half.

While a poor harvest brings with it many challenges, it does provide a true opportunity to prove the success of a targeted hop breeding program. However, the success of a variety does not just rely on its agronomic prowess; brewer and grower acceptance

are vital in its lifecycle. It is critical that this transition begins so that the cost basis and supply chain of hops can remain intact in the face of many other challenges, for example cost inflation and the reduction in the number of permitted plant protection materials.

The **Hopsteiner Guidelines 2022** are now available on our homepage [WWW.HOPSTEINER.COM/DE](http://WWW.HOPSTEINER.COM/DE).

*Simon H. Steiner, Hopfen, GmbH & Co. KG*  
*S.S. Steiner, Inc.*

Newsletter, December 2022

## WORLD ALPHA ACIDS PRODUCTION 2019 – 2022

Total Crop Quantities in mt					% share				
	2019	2020	2021	2022*	2019	2020	2021	2022*	
Aroma Varieties	74,384	71,265	75,906	62,549	57.6	58.4	58.2	59.7	
Bitter Varieties	55,776	50,729	54,446	42,184	43.2	41.6	41.8	40.3	
<b>Total</b>	<b>129,160</b>	<b>121,994</b>	<b>130,353</b>	<b>104,733</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	

  

Alpha Amount in kg					Alpha Content in %				
	2019	2020	2021	2022*	2019	2020	2021	2022*	
Aroma Varieties	4,610,200	5,167,700	5,501,500	4,387,400	6.2	7.3	7.2	7.0	
Bitter Varieties	6,705,800	6,256,100	7,065,800	5,000,400	12.2	12.3	13.0	11.9	
<b>Total</b>	<b>11,316,000</b>	<b>11,423,800</b>	<b>12,567,300</b>	<b>9,387,800</b>	<b>8.8</b>	<b>9.4</b>	<b>9.6</b>	<b>9.0</b>	

## WORLD HOP ACID SUPPLY AND DEMAND 2015 – 2022

	Production	Beer Production	Alpha Dosage	Alpha Usage	Annual Balance	
	(mt Alpha)	(Mio hl)	(g Alpha / hl)	(mt Alpha)	(mt Alpha)	
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	9,369	754
2019	11,316	2020	1,767	4.8	8,482	2,834
2020	11,424	2021	1,856	4.9	9,094	2,330
2021	12,567	2022*	1,879	4.8	9,019	3,548
2022*	9,388	2023*	1,902	4.8	9,130	258

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