1984/85

HOPS

Joh. Barth&Sohn

Conversion Table

1 ha	= 2,934 bayerische Tagwerk
1 ha	= 2,471 acres
1 bayerisches Tagwerk	= 0,341 ha
1 acre	= 0,405 ha
1 hl = 100 l	= 26,42 gall = 0,8523 bbl (USA)
	= 22,01 gall = 0,6114 bbl (Brit.)
1 bbl (USA)	= 31 gall = 1,1734 hl
1 bbl (Brit.)	= 36 gall = 1,6365 hl
1 metr. ton = 1.000 kg	= 20 Ztr. = 2.204,6 lbs
1 Ztr. = 50 kg	= 110,23 lbs = 1,102 cwt (USA)
	= 110,23 lbs = 0,984 cwt (Brit.)
1 cwt (USA)	= 100 lbs = 45,359 kg
1 cwt (Brit.)	= 112 lbs = 50,8 kg
1 cental (Brit.) = 100 lbs	= 45,359 kg = 0,9072 Ztr.
1 kg	= 2,20462 lbs
1 lb	= 0,45359 kg

Conversion of thermometer degrees in Fahrenheit and Celsius:

$$86\ ^\circ F = \frac{(86-32)\ 5}{9} = 30\ ^\circ C$$

$$30\ ^\circ C = \frac{30 \cdot 9}{5} + 32 = 86\ ^\circ F$$

Currency Exchange Table

As of 31 May 1985 the Frankfurt Currency Exchange Market listed:

	Discount Rate	Spot Rate 5/31/85 G	B
New York *	7.5	3.0852	3.0932
London *	12	3.929	3.943
Dublin *	12	3.125	3.139
Montreal *	9.76	2.2385	2.2465
Amsterdam	5.5	88.60	88.82
Zurich	4	118.39	118.59
Brussels	9¼	4.960	4.980
Paris	9.5	32.74	32.90
Copenhagen	7	27.75	27.87
Oslo	8	34.79	34.91
Stockholm	11.5	34.575	34.735
Milan **	15.5	1.563	1.573
Vienna	4.5	14.205	14.245
Madrid	8	1.760	1.770
Lisbon	25	1.755	1.775
Tokyo	5	1.2255	1.2285
Helsinki	9	48.11	48.31
Athen *	20.5	2.250	2.290

* = 1 unit, ** = 1000 units, all other 100 units

The Most Important Data of the Hops World Market

	1984	1983	Diff. %
acreage/ha	92.821	95.665	− 3,0
hop production/tons	128.728	132.742	− 3,0
alpha production/tons	8.175	7.540	+ 8,4
beer production/1000 hl	968.122	972.286	− 0,4

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Nuernberg, July 1985

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Political Situation

After an interruption of almost 1 year, the **United States** and the **USSR** decided to resume the arms negotiations in Geneva.

The trouble spots in the **Islamic world** continued to constitute a threat to world peace. Clashes between hostile religious and ethnic groups became more intensive in **Lebanon** after the departure of the Israeli troops. The war between **Iran** and **Iraq** spread from the front lines to the bombing of cities. Unresolved problems still exist in **Afghanistan** and in **Central America.**

After long-drawn-out negotiations it was possible to complete the planned expansion of the **European Community** (EC) toward the South with the admission of **Spain** and **Portugal** as of January 1, 1986. In spite of the political determination to enlarge the EC, differences in economic interests proved to be difficult to resolve. The main problems in arriving at an agreement were to be found in the market regulations for farm products as well as fishing rights.

Economic Situation

The world economy's upswing continued. As part of this development, the world's gross product went up by 4.8% (preceding year: 3.7%) and the world trade growth rate rose by 7.5% (preceding year: 3.4%). In this connection, comparatively stable and from time to time reduced raw material prices – especially in the case of crude oil – provided for relative price stability. In general it was possible to benefit from the high Dollar exchange rate which led to strong exports to the United States. America's tremendous trade deficit acted as a driving force especially for the Western European and Asian national economies. The debt situation of many African and Latin American countries continues to be unresolved although refunding transactions (debt renegotiations) provided a brief breathing spell. Here it turned out that the austerity policy ordered by the IMF is difficult to implement in political terms and in most cases is not being complied with.

Key Data:	**USA**	**Fed. Rep. of Germ.**
1984 GNP	+ 6.9%	+ 2.5%
1984 balance of trade	– $ 123.31 bill.	+ DM 54.0 billion
1984 balance of payments	– $ 101.60 bill.	+ DM 17.9 billion
1984 rate of inflation	4.3%	2.4%
rate of interest per June 1, 1985	10.0% (NY prime rate)	4.5 % (Diskont)
rate of unemployment per 31.12.84	7.2%	9.4%

Table of Bitter Constituents

Bitter constituent values of the most important European varieties:

	crop 1984			**crop 1983**		
variety	total resin %	alpha %	% in total resin	total resin %	alpha %	% in total resin
Hallertau Hallertau	11.7	4.2	36.0	9.2	2.9	31.5
Hallertau Hersbruck	12.0	4.3	35.8	9.0	2.8	31.1
Hallertau Hüller	12.9	4.9	38.0	10.6	3.9	36.8
Hallertau Perle	14.0	6.5	46.4	11.5	4.5	39.1
Hallertau Record	15.2	6.7	44.1	12.3	4.5	36.6
Hallertau Northern Brewer	16.5	8.1	49.1	12.0	5.3	44.2
Hallertau Brewers Gold	13.8	6.5	47.1	11.8	4.5	38.1
Tettnang	11.4	4.1	36.0	9.3	3.1	33.3
Spalt	11.6	4.2	36.2	9.5	3.0	31.6
Saaz	11.2	3.8	33.9	9.5	2.9	30.5
Yugoslavian Styrian Golding	17.0	6.5	38.2	10.5	4.2	40.0
Yugoslavian Super Styrian	18.8	9.0	47.9	13.8	6.5	47.1
Belgian Northern Brewer	17.1	8.5	49.7	16.0	7.8	48.8
Belgian Brewers Gold	13.9	6.5	46.8	14.5	6.0	41.4

The bitter content values of the most important English varieties are listed under the heading "England".

The above stated values are considered as is, alpha acids measured conductometrically and determined in October/November after the harvest. They cannot form the basis of deliveries in the later course of the season.

World Beer Production 1984

Specification in 1000 hl

EUROPE

Country	1984	1983
Fed. Rep. of Germany	92.286	94.980
USSR	66.100*	68.000*
Great Britain	61.470	61.700
German Dem. Rep.	26.000	25.500
Czechoslovakia	23.780	24.956
France	20.288	22.086
Spain	21.832	22.082
Netherlands	17.048	17.327
Belgium*	15.000	14.620
Yugoslavia	13.600	12.378
Rumania	11.500*	11.500*
Poland	9.660	10.076
Denmark	8.670	8.400
Italy	9.409	10.111
Austria	8.213	8.340
Hungary	7.912	7.812
Ireland	5.449	5.596
Bulgaria	5.500*	6.000*
Switzerland	4.116	4.160
Sweden	3.460	3.485
Portugal	3.665	3.849
Greece	3.000	2.800
Finland	2.956	2.854
Norway	1.938	1.900
Luxembourg	626	626
Malta	117	135
Albania	100*	100*
Iceland	41	38
TOTAL	443.736	451.431

AMERICA

Country	1984	1983
USA	226.490	230.331
Brazil	28.350	29.000
Mexico	25.082	23.611
Canada	23.012	22.599
Venezuela	11.820	11.769
Colombia	14.500	11.760
Peru	5.000	5.230
Ecuador	2.607	2.654
Cuba	2.600	2.400
Argentina	3.979	3.116
Chile	1.776	1.766
Bolivia	735	1.067
Paraguay	1.100	1.100
Dominican Rep.	920	989
Panama	870	730
Uruguay	315	325
Puerto Rico	300	400
Jamaica	600	650
Guatemala	596	450
Costa Rica	490	636
Honduras	561	424
Nicaragua	575	500
El Salvador	329	334
Trinidad	250	250
Netherl. Antilles	117	125
Surinam	150	151*
Martinique	70	73
Windward-Leeward	0	50
Guadeloupe	28	30
Haiti	20	19
Belize	40	40
Grenada**	25	0
St. Kitts**	25	0
Barbados**	55	0
San Lucia**	35	0
Falkland Islands	5	0
TOTAL	333.427	352.539

AFRICA

Country	1984	1983
South Africa	13.000	12.000
Nigeria	9.000	10.000
Cameroon	4.729	4.180
Zaire	3.027	2.949
Kenya	2.400	2.300
Ivory Coast	1.310*	1.350*
Rwanda + Burundi	1.373	1.191
Zambia	804	1.000
Zimbabwe	850	850
Tansania	706	656
Gabon	727	710
Angola	655	611
Ethiopia	726	702
People's Rep. of Congo	902	776
Algeria	700*	700*
Moçambique	390	444
Upper Volta	505	400
Togo	359	325
Egypt	400	315
Morocco	360	360
Benin	335	395
Senegal	170*	380*
Tunisia	400	400
Namibia	300	336
Ghana	250	250
Mauritius + Reunion	275	268
Madagascar	230	236
Central African Rep.	220	120
Liberia	120	118
Chad	134	124
Sierra Leone	35	68
Guinea Bissau	26	36
Uganda	169	100
People's Dem.Rep.Jemen	60	60
Niger	90	90
Seychelles	38	42
Malawi	155	154
Sudan	0	0
Gambia	12	20
Botswana	200	175
Swaziland	150	0
Lesotho	200	0
TOTAL	46 492	45.191

NEAR EAST

Country	1984	1983
Turkey	2.625	3.300
Iraq	600*	730*
Israel	400	420
Cyprus	233	229
Lebanon	60	42
Syria	90*	90*
Jordan	90	90
TOTAL	4.098	4.901

FAR EAST

Country	1984	1983
Japan	46.689	49.323
Philippines	9.230	8.700
People's Rep. China	20.000	16.600
South Korea	7.800	7.070
Taiwan	3.071	2.999
Malaysia	576	600
Singapore	426	500
Vietnam	1.900*	1.500*
India	1.700	1.680
Thailand	1.610	1.500
North Korea	1.000*	1.000*
Hong Kong	1.350	1.300
Indonesia	635	825
Okinawa	360	300
Iran	100***	110***
Mongolia	100	100
Sri Lanka	74	44
Burma	40*	40*
Nepal	37	10
Pakistan	10	10
Laos	7*	7*
Bangla-Desh	5*	5*
TOTAL	96.720	94.223

AUSTRALIA/ OCEANIA

Country	1984	1983
Australia	18.949	19.350
New Zealand	3.839	3.800
New Guinea	510	470
Fiji Islands	164	150*
Tahiti	97	96*
Samoa	40	44*
New Caledonia	50	51*
TOTAL	23.649	23.961

*estimated

** previously incorporated in Windward-Leeward

*** non alcoholic

WORLD

968.122	972.286[1]

[1] Production 1983 is somewhat higher than in our report 1983/84 due to the fact that we have received accurate figures for some countries

Output Development

World beer output stagnated once again during the 1984 brewing year and statistically even showed a drop of 0.4%. It must of course be kept in mind that some important beer production figures are only estimated or are to be released only after we have gone to press. Here is the development of the situation on the various continents:

	1984	1983
Europe	−1,6%	+0,4%
America	+0,3%	−1,7%
Africa	+2,9%	−1,5%
Asia	+1,1%	+5,0%
Australia/ Oceania	−1,4%	−1,7%
Total	−0,4%	−0,1%

Market Analysis

There was no incentive whatsoever for the hop market while world beer output stagnated and hop requirements remained the same at best.

Inspite of a 3% reduced world acreage the total amount of alpha of the world crop was higher than in 1983 because of a **higher average bitter content in the hops.**

As a consequence the world market continued to be oversupplied. In keeping with this situation, spot hops not secured by contracts were sold below production costs after the harvest in the main centers of Europe and the United States.

As part of this development price pressure was especially exerted on European and American bitter hops while Aroma hops and other special varieties were sold more easily and at higher quotations.

The almost complete sale of the 1984 world crop resulted in an additional **increase of brewery inventory.** This can be observed on all markets but especially on the segment of the world market that is supplied by American hops (North-, Central- and South America).

Contrary to the rather depressed market condition a number of Communist and Third World countries expanded hop acreage mostly for reason of covering their own domestic needs. This measure being independent of any economic consideration will further increase pressure on the traditional hops exporting countries. In the final analysis it will cause these countries by the force of low prices to considerably shrink existing acreage.

The percentage of contractually sold hops is estimated to be as follows (%):

Crop	1985	1986	1987	1988	1989	1990
USA	85	60	45	25	10	–
Fed. Rep. of Germ.	80	70	60	50	30	30
Belgium	20	10	5	–	–	–
CSSR	90	80	60	50	–	–
Yugoslavia (Slov.)	80	75	70	60	40	40
England	70	50	40	15	15	15

Our contract estimate is based on the current growing areas; it does not make allowance for any future idling.

Acreage and Hop Production

area	1984 acreage in ha	1984 ø tons per ha	1984 crop in tons = 1000 kg	1983 acreage in ha	1983 ø tons per ha	1983 crop in tons = 1000 kg
Hallertau	16.721	1,86	31.091,6	16.868	1,92	32.341,0
Spalt	797	1,29	1.025,5	789	1,38	1.091,8
Hersbruck	151	1,38	208,4	163	1,31	213,7
Jura	719	1,99	1.434,5	724	2,06	1.488,7
Tettnang	1.219	1,46	1.777,0	1.219	1,38	1.681,4
others	21	1,13	23,7	21	1,50	31,5
Fed. Rep. of Germany	**19.628**	**1,81**	**35.560,7**	**19.784**	**1,86**	**36.848,1**
Kent	2.804	1,57	4.390,0	2.920	1,48	4.326,7
Hampshire	135	1,07	145,0	194	1,55	300,1
Sussex	216	1,53	330,0	231	1,43	331,3
Herefordshire	1.449	1,59	2.300,0	1.674	1,61	2.689,9
Worcestershire	490	1,50	735,0	599	1,44	860,1
England	**5.094**	**1,55**	**7.900,0**	**5.618**	**1,51**	**8.508,1**
Aalst	149	1,81	269,0	160	2,33	372,5
Poperinge	602	1,86	1.118,7	631	1,81	1.144,5
Vodelée	11	1,90	20,9	24	1,25	30,0
Belgium	**762**	**1,86**	**1.408,6**	**815**	**1,90**	**1.547,0**
Alsace	421	1,78	751,4	440	1,77	779,4
Burgundy	28	1,53	42,9	31	1,46	45,1
Nord	223	2,08	464,0	245	1,97	482,5
France	**672**	**1,87**	**1.258,3**	**716**	**1,83**	**1.307,0**
Ireland	**76**	**1,44**	**109,7**	**76**	**1,44**	**109,7**
Greece	**25**	**1,38**	**34,5**	**25**	**1,38**	**34,5**
EEC	**26.257**	**1,76**	**46.271,8**	**27.034**	**1,79**	**48.354,4**
Saaz	7.637	0,91	6.953,0	7.582	1,05	7.944,2
Auscha	1.663	0,94	1.565,0	1.601	1,15	1.835,8
Tirschitz	739	1,08	797,0	697	1,05	729,3
Slovakia	1.469	1,04	1.529,0	1.345	0,86	1.157,6
Czechoslovakia	**11.508**	**0,94**	**10.844,0**	**11.225**	**1,04**	**11.666,9**
USSR*	**16.500**	**0,61**	**10.000,0**	**16.500**	**0,73**	**12.000,0**
Slovenia	2.479	1,79	4.447,0	2.439	1,35	3.293,6
Backa and Ilok	920	1,60	1.475,0	945	1,27	1.200,0
Yugoslavia	**3.399**	**1,74**	**5.922,0**	**3.384**	**1,33**	**4.493,6**
Germ. Dem. Rep.	**2.370**	**1,33**	**3.155,0**	**2.260**	**1,58**	**3.567,0**
Poland	**2.513*****	**1,09*****	**2.745,0*****	**2.489**	**1,20**	**2.990,0**
Bulgaria*	**1.300**	**0,65**	**850,0**	**1.200**	**0,75**	**900,0**
Rumania*	**2.000**	**0,88**	**1.750,0**	**2.000**	**0,90**	**1.800,0**
Hungary	**532**	**1,10**	**579,5**	**563**	**0,93**	**522,7**
Spain	**2.003**	**1,42**	**2.844,7**	**2.003**	**1,46**	**2.916,1**
Mühlviertel	78	1,27	98,9	71	1,58	112,0
Leutschach	70	1,56	109,0	67	1,42	95,0
Austria	**148**	**1,40**	**207,9**	**138**	**1,50**	**207,0**
Switzerland	**17**	**1,36**	**23,1**	**12**	**1,45**	**17,4**
Portugal	**178**	**2,00**	**356,0**	**179**	**1,31**	**234,9**
Albania**	**70**	**1,00**	**70,0**	**70**	**1,00**	**70,0**
EUROPE	**68.795**	**1,24**	**85.619,0**	**69.057**	**1,30**	**89.740,0**
Washington	9.343	2,12	19.769,3	10.833	2,14	23.199,2
Oregon	1.992	1,58	3.150,1	2.563	1,77	4.543,6
Idaho	1.289	1,91	2.460,3	1.448	1,97	2.841,3
California	53	1,60	84,7	205	1,52	310,7
USA	**12.677**	**2,01**	**25.464,4**	**15.049**	**2,05**	**30.894,8**
Canada	**329**	**1,09**	**357,7**	**317**	**1,55**	**489,8**
Japan	**1.068**	**1,78**	**1.897,1**	**1.100**	**1,58**	**1.747,7**
Australia	**1.322**	**1,98**	**2.614,0**	**1.440**	**1,28**	**1.840,0**
New Zealand	**190**	**2,35**	**446,0**	**210**	**1,75**	**367,9**
People's Rep. of China*	**6.000**	**1,67**	**10.000,0**	**6.000**	**0,92**	**5.500,0**
Dem. People's Rep. of North Korea*	**580**	**1,00**	**578,0**	**400**	**1,00**	**400,0**
Republic of South Korea*	**473**	**1,25**	**591,0**	**383**	**1,14**	**438,0**
South Africa	**385**	**0,95**	**367,0**	**357**	**1,18**	**420,0**
India	**325**	**0,55**	**180,0**	**300**	**0,50**	**150,0**
Colombia*	**2**	**2,00**	**4,0**	**2**	**2,00**	**4,0**
Turkey	**420**	**0,86**	**360,0**	**850**	**0,68**	**580,0**
Argentina*	**255**	**0,98**	**250,0**	**200**	**0,85**	**170,0**
WORLD	**92.821**	**1,39**	**128.728,2**	**95.665**	**1,39**	**132.742,2**

* estimate

** see the following report

Alpha Acid Production

The alpha acid production of the world can be subdivided into the following categories:

group A: finest aroma hops (Saaz, Tettnang, Spalt)
group B: aroma hops (Hallertau, Hersbruck, Hüll, Perle, Strisselspalt, Golding, Fuggle, Cascade, and others)
group C: hops of no importance in the world market
group D: bitter hops (Northern Brewer, Brewers Gold, Cluster, Bullion, Pride of Ringwood, high-alpha hops of USA and UK)

Thus a comparison of the alpha production of 1984 with that of the previous year resulted in the following bitter constituent grouping in the world hop crop:

	1984				1983			
group	share %	crop tons	α % ø	α tons	share %	crop tons	α % ø	α tons
A	7	14,819.0	3.80	563.0	11	14,508.0	3.58	520.0
B	14	24,620.0	4.80	1,182.0	21	30,050.0	4.13	1,240.0
C	25	33,432.0	6.20	2,073.0	27	33,132.0	5.55	1,840.0
D	54	55,857.0	7.80	4,357.0	41	55,052.0	7.15	3,940.0
Total	100	128,728.0	6.40	8,175.0	100	132,742.0	5.68	7,540.0

Due to the good European bitter values and the growing acreage of high alpha hops, the bitter hops managed to increase their overall percentage over that of last year.

Alpha Acid Balance

It is to be assumed that the world hopping rate, which at last report was 7.2 g alpha per hl, did not experience any further reduction. Here of course we must depend on estimates since no official statistics are available. The continuation of past alpha acid balance for the 1984 and 1985 requirement years reveals the following picture:

1982 demand (Hopping rate 7.4 gr alpha/hl)	7,166.5 tons alpha
1981 production	8,049.1 tons alpha
Surplus	882.6 tons alpha
1983 demand (Hopping rate 7.3 gr alpha/hl)	7,100.0 tons alpha
1982 production	8,471.0 tons alpha
Surplus	1,371.0 tons alpha
1984 demand (Hopping rate 7.2 gr alpha/hl)	7,000.0 tons alpha
1983 production	7,540.0 tons alpha
Surplus	540.0 tons alpha
1985 demand (Estimate-Hopping rate 7.2 gr alpha/hl)	6,950.0 tons alpha
1984 production	8,175.0 tons alpha
Surplus	1,225.0 tons alpha

The surplus from the 1982-1984 harvest comes to about 4,000 t Alpha acids or a requirement for about 7 months of brewing. To these stockpiles we must add another average standard inventory amount in the brewing industry which can be estimated at half a year.

European Community

The budget of the European Community is facing increasing financing difficulties. Agricultural subsidies alone annually take up more than 70 % of the available funds.
The following subsidy was paid out to hop producers for the 1983 harvest:

Variety	Growers Inside EC *	Growers in member State Greece
Aroma hops	300	170.0
Bitter hops	250	143.0
Other varieties	300	170.0

(*) Unchanged, as during preceding year
Figures given in ECU per ha; 1 ECU corresponds to DM 2.51457.

The farmers of the European Community received the following assistance: (1000 ECU)

Fed. Rep. of Germany	5,504
France	188
Belgium	400
Great Britain	1,549
Ireland	19
Greece	4
Total	7,664 = Mio. DM 19,267

Roughly the same aid amount as during preceding years has been figured for the 1984 harvest.

An amendment in EC Regulation No. 870/78 concerning the permissible amount of shatter in farmer's bales is currently under discussion.

Federal Republic of Germany

Growing Conditions, Estimated Harvest and Actual Weight

The spring was too cold and dry and this had an unfavorable effect on hop growth. Weather conditions fluctuated extremely during May, June, and July and this likewise did not help the crop. Intervals with seasonally warm summer weather did not begin until the middle of July and this hinted at an average harvest.
The official harvest estimate in the German growing regions was conducted between August 20 and 23. Here are the estimated figures.

Area	**Estimate Tons**	**Quantity harvested Tons**
Hallertau	31,400	31,091.6
Spalt	1,165	1,025.6
Jura	1,450	1,434.5
Tettnang	1,825	1,777.0
Hersbruck	235	208.4

The estimated quantity was not attained in any of the German growing regions.

The considerable difference between the estimate and the quantity actually harvested in the Spalt growing region is blamed on a hail storm whose effects were underestimated.
The German harvest was bought up rather briskly. Just about 34,000 t or 95 % of the total harvest of the Federal Republic of Germany had passed the official scales by the end of October 84.

Varieties

In Germany the following varieties were cultivated and resulted in the following harvest figures:

area	variety	ha	Ø-yield/tons	amount harvested/tons
Hallertau	Hallertau	1.238	1.19	1.470,2
	Hersbruck	4.508	1.83	8.256,8
	Hüll	1.207	1.32	1.587,8
	Perle	1.002	2.22	2.219,9
	Northern Brewer	5.623	1.99	11.214,7
	Brewers Gold	2.752	2.10	5.779,4
	others	391	1.43	562,6
Jura	Hallertau	108	1.62	175,0
	Hersbruck	333	2.03	675,4
	Hüll	26	0.93	24,3
	Perle	70	2.00	139,9
	Northern Brewer	54	1.84	99,1
	Brewers Gold	128	2.51	320,9
Spalt	Hallertau	490	1.28	625,9
	Spalt	250	1.37	343,6
	Perle	17	0.63	10,7
	others	40	1.13	45,3
Hersbruck	Hallertau	73	1.38	100,4
	Hersbruck	52	1.35	70,5
	others	26	1.44	37,5
Tettnang	Hallertau	289	1.68	486,5
	Tettnang	923	1.38	1.276,8
	others	7	1.96	13,8
remainder		21	1.13	23,7

Acreage

In the **Federal Republic of Germany** following acreage reductions resulted:

area	acreage development			varieties-aroma					bitter varieties and others		
	acreage 1984 ha	+ / - ha	acreage 1983 ha	Hallertau ha	Spalt ha	Tettnang ha	Hersbruck ha	Perle ha	Northern Brewer ha	Brewers Gold ha	others ha
Hallertau	16721	-147	16868	1238	21	–	4508	1002	5623	2752	1577
Jura	719	- 5	724	108	–	–	333	70	54	128	26
Spalt	797	+ 8	789	490	250	–	6	17	4	23	7
Hersbruck	151	- 12	163	73	–	–	52	5	13	6	2
Tettnang	1219	0	1219	289	–	923	7	–	–	–	–
others	21	0	21	6	–	7	–	1	1	2	4
total	19628	-156	19784	2204	271	930	4906	1095	5695	2911	1616

Source: Verband deutscher Hopfenpflanzer e.V.. Bericht über die Vermarktung der Ernte 1984.

The greatest varietal shift in the region Hallertau was found to have taken place in the Hallertau varieties at minus 151 ha and in the Hersbruck varieties at minus 47 ha. On the other hand, the Perle variety was newly planted on an area of 145 ha. The changes in the other regions and varieties are insignificant in comparison.

There was a minor shift at the expense of aroma hops in the aroma-bitter variety ratio:

varieties	1984	1983
Aroma varieties	54 %	55 %
Bitter varieties	44 %	43 %
Miscellaneous	2 %	2 %

Market Developments

Because of the delay in the harvest and the low purchasing price quotations, spot hops did not move well at first. On the other hand, the brewing industry displayed sustained interest in stockpiling additional supplies because of the favorable prices. When it then turned out shortly after the harvest that the estimated quantities for the varieties Hallertau Hersbruck and Hallertau Hallertauer as well as Spalt would not be attained, the situation on the aroma market was suddenly firmed up with a nominal rise in price quotations by DM 50.00 for the Hallertau varieties and DM 100.00 for Spalt and Tettnang.

In this connection, all of the aroma hops became temporarily unavailable.
The market for the bitter hop varieties on the other hand remained highly liquid because of satisfactory harvests in the German regions and because other European growing regions retained their delivery capacity.
Except of some scattered lots all German growing regions were sold out beginning November 1984. Since prices had become firmer by the same time interest of the breweries leveled off. The further development on the market might be described as rather slack and devoid of any major impetus from supply and demand.

The price level on the spot market continued to be unsatisfactory for the growers as far as the Hallertau varieties were concerned. On the other hand, the Spalt and Tettnang special varieties were able to rise above the generally low price level and to yield earnings that would at least cover the production costs.

Our **market reports** contained the following price quotations for uncommitted hop quantities:

area/variety	6/84	8/84	9/84	10/84	11/84	12/84	1/85	2/85
HALLERTAU Hersbrucker	320.–	320.–	320.–	o.N.	370.–	380.–	380.–	380.–
HALLERTAU Perle	320.–	320.–	320.–	320.–	370.–	380.–	380.–	380.–
HALLERTAU Northern Brewer	360.–	360.–	360.–	230.–	270.–	270.–	280.–	280.–
HALLERTAU Brewers Gold	280.–	280.–	280.–	170.–	180.–	190.–	190.–	190.–
SPALT	540.–	540.–	440.–	o.N.	o.N.	540.–	540.–	540.–
TETTNANG	540.–	540.–	440.–	o.N.	o.N.	o.N.	560.–	560.–

o.N. = no price available

The above quotations are tube understeed for 50 kg of packed hops, ex warehouse, excluding packing material and VAT.

ENGLAND

Growing Conditions, Harvest, and Market Developments

A rather moist and mild winter was followed in some regions by a sustained dry spell in the spring and summer. In the case of the aroma varieties, this led to poor growth throughout whereas in the case of the high Alpha hops, the harvest outluck was better.
Picking began already during the last week of August. The hops were healthy and yielded good bitter values:

Variety	acids alpha % 1984	acids alpha % 1983
Wye Target	11,4	11,3
Yeoman	10,8	11,0
Challenger	8,2	8,3
Golding (Kent)	5,8	5,8
Bramling Cross	6,5	6,5
Bullion (Kent)	9,2	9,0

Alpha acids, as is, measured by conductometer, September figures after harvest.

The English spot hops were sold rapidly, of course at the generally low world market prices that were below the production costs. Here it was especially the Wye Target and Yeoman High Alpha varieties that were sold also abroad. Unsold hops in spring 1985 consisted of 100 tons of Aroma hops and 10 tons Alpha hops.

Forward contract for the coming harvests were reported as follows:

Harvest	Tons	% of 1984
1985	5,400	68
1986	4,030	51
1987	3,200	41
1988	1,185	15

The table "Varietal Cultivation" demonstrates that the planting of Wye Target and Yeoman High Alpha hops increased while total acreage declined (down 524 ha). On the other hand, it was especially the Bullion and Golding varieties that lost ground.

England

Varietal Cultivation

variety/ha	total		WGV		Fuggles		Bramling Cross		Northern Brewer		Bullion		Wye Northdown	
area	84	83	84	83	84	83	84	83	84	83	84	83	84	83
Kent	2476	2587	151	181	40	44	103	182	7	13	9	28	88	135
Sussex	216	230	–	–	19	23	6	11	–	–	3	10	3	5
Hampshire	135	193	–	–	3	3	–	–	5	27	–	–	96	132
Herefordshire	1268	1491	–	–	425	431	–	–	28	91	27	43	359	462
Worcestershire	400	513	–	–	82	70	–	–	15	38	5	21	112	166
brewery cultivation	599	604	17	14	–	–	10	21	49	50	89	89	57	56
total	5094	5618	168	195	569	571	119	214	104	219	133	191	715	956

variety/ha	Wye Challenger		Wye Target		Wye Saxon		Yeoman		Goldings		others	
area	84	83	84	83	84	83	84	83	84	83	84	83
Kent	174	233	1111	1047	17	49	388	262	309	308	79	105
Sussex	21	28	106	103	–	–	45	31	6	7	7	12
Hampshire	11	20	–	–	–	–	–	–	–	–	20	11
Herefordshire	288	344	16	16	–	–	7	–	94	94	24	10
Worcestershire	91	114	–	–	–	–	–	–	89	98	6	6
brewery cultivation	74	78	161	153	3	3	37	27	26	26	76	87
total	659	817	1394	1319	20	52	477	320	524	533	212	231

FRANCE

Growth and Harvest Development

A sometimes cold spring weather had an unfavourable effect on hop plants. The retarded development of hops from this period could not be made up during the ensueing time. At best only a good average harvest was expected. A quantity of 1,365 tons was estimated in August 1984.

Market Developments

Sixty percent of the French crop had been sold in advance on a contract basis. The uncommitted hops mostly involved Brewers Gold and Northern Brewer varieties which were sold on the world market. In line with the general price trend also French growers had to accept prices far below their own cost.

FRANCE

Cultivation of varieties

The acreage cultivated per variety in contrast to the previous year had changed as follows:

variety/ha	total		Aroma hops		Brewers Gold		Northern Brewer	
area	84	83	84	83	84	83	84	83
Alsace	421	440	171	169	219	228	31	44
Nord	223	245	–	–	177	190	46	55
Burgundy	28	31	3	5	25	26	–	1
total	672	716	174	174	421	444	77	100

The quantity harvested can be broken down into varieties as follows:

variety/to	total	Aroma hops	Brewers Gold	Northern Brewer + others
Alsace	751.4	228.8	476.7	45.9
Nord	464.0	–	372.0	92.0
Burgundy	42.9	2.6	40,4	–
total	1258.3	231.4	889.1	137.9

(Totals may not agree with addition of individual items because of rounding)
For 1985 a further acreage reduction to about 632 ha was reported.

BELGIUM

Growth, Crop and Market Developments

Following a dry winter and a wet but partly cold spring, the crop developed normally in June/July and until the harvest. Picking started on September 3 and continued until September 27.
Bitter hops like Belgian Brewers Gold and Belgian Northern Brewers encountered good demand on the world market. The entire Belgian crop was sold by the end of February 1985 except for about 25 tons.

Varietal Cultivation and Crop Quantity

Variety	ha	tons
Hallertauer	108	181,2
Northern Brewer	284	505,9
Brewers Gold	305	615,5
other varieties	65	105,9
Total	**762**	**1.408,5**

A decrease in the surface area by about 45 ha has been reported for the 1985 harvest.

The following price quotations were paid for 50 Kilos ex warehouse:

Variety	Sept. 84	Oct. 84	Nov. 84	Dez. 84	Jan. 85	Feb. 85
Brewers Gold/bfrs	–	2.000,–	2.000,–	2.500,–	2.500,–	3.000,–
Northern Brewer/bfrs	4.000,–	2.500,–	3.000,–	4.000,–	–	–
Hallertau/bfrs	3.750,–	3.500,–	3.500,–	–	3.750,–	–

YUGOSLAVIA

Styria

Weather conditions in this growing region were unfavorable for hops during the first few months of the year 1984.
A cold winter combined with heavy snow fall delayed the vegetation. The situation was improved by high temperature as well as sufficient precipitation in July and August. In spite of the delayed growth hops were abundant with excellent lateral development. A quantity of about 150 tons of hops was destroyed by hailstorms.

The hop quality could be termed good in general; the bitter content was between 5% to 6% for Golding and 9% to 10% for the Super Styrian varieties. Varietal acreage can be shown as follows:

Variety	84 ha	83 ha
Styrian Golding	910	928
Aurora	1.155	1.089
other varieties	414	420
Total	**2.479**	**2.437**

The following quantities were harvested per variety:

Variety	tons
Golding	1.415
Aurora	2.320
others	712
Total	**4.447**

No major acreage changes are expected for the 1985 harvest year but it would seem that there would be a further shift in favor of Alpha hops.

Bačka

The winter brought sufficient precipitation without extremely low temperatures. It was possible to finish work in the hop gardens on schedule during the spring, and the region was not damaged by any severe storms or hail during the time leading up to the harvest.
The total growing area was distributed as follows: 650 ha for the Backa variety, 150 ha for the Neo Planta variety, and 120 ha for new varieties. A cultivation of 860 ha is expected for the 1985 harvest.

CZECHOSLOVAKIA

Weather conditions were not favorable during the spring months. During March, the average temperatures were 25% and the precipitation volume was 80% below normal. Following varied conditions in April and May, June once again brought unusually low temperatures. An extreme temperature of only 3°C was recorded in the Saaz growing region. A brief heat wave during the second half of June was followed by cold weather with night-time temperatures of 6-8°C.
In spite of generally unfavourable weather conditions hops were showing a good stand. The bitter values were about 0.6% higher than normal.
For 1985 an acreage of 12113 ha has been indicated.

GDR

The crop area and the harvest quantity were distributed as follows over the aroma and alpha hops varietal groups:

Varietal group	ha	Quantity harvested
Aromahops	280	253,5
Alphahops	2.090	2.901,5
Total	**2.370**	**3.155,0**

The share of aroma hops, which in 1982 was still 20%, continues to decline.
A minor increase in acreage to 2,450 ha has been reported for the year 1985. The increase is to be used entirely for growing bitter hops while the aroma varieties will shrink further.

SPAIN

Just about the same crop as last year was harvested on an unchanged cultivation area. The harvest can be broken down over the individual varieties as follows:

Var. H 7	961.1 t
Var. H 3	1,874.8 t
Other var.	8.8 t
Total	2,844.7 t

The bitter content averaged out at 7.5%.

The Spanish harvest was bought by the domestic brewery industry. The same cultivation area as for 1984 has been reported for 1985.

POLAND

In the late spring and the start of the summer, weather conditions were not at all favorable and this had a bad effect on the crop state. The growth did not improve until August as a result of warm and sunny weather. This resulted in an average harvest. The development of the harvest as such was hindered by severe gusts of wind in some regions.

The Polish harvest can be broken down as follows:

Variety	ha	Quantity harvested
Lublin	2.253	2.529
Pulawy	100	110
Estera	30	36
Northern Brewer	50	70
Total	**2.433**	**2.745**

An additional area of 80 ha was newly planted. An acreage of presumably 2,800 ha has been reported for the year 1985.

AUSTRIA

Mühlviertel (Region)

In spite of unfavorable weather, it was possible to bring in a crop of good quality. Out of the total harvest of 98.87 t, 97,5% were classified as grade I. The Alpha acids of the hops were somewhat higher than last year whereas the yield per ha was about 20% lower, meaning that contracts with domestic breweries could only be met by 90%.

A correction is needed for our "Hops 1983-1984" report. The Austrian brewing industry did not pay the growers 44.33 Austrian schillings but rather 84.33 Austrian schillings per kg.

Styria (Leutschach)

The 1984 harvest result was 109 t on an area of 70 ha. About 66% came from the Golding variety, an aroma variety. The rest was consisting of the bitter varieties Aurora, Atlas, Apollo and Brewers Gold. The 21 hop growers of this region enjoy a contract with the Styrian brewing industry comprising guaranteed delivery at a minimum price.

SWITZERLAND

The total area of 17.08 ha is divided into approximately 6 ha for the Tettnang variety, 8.5 ha for the Hallertau variety, and 2.45 ha for Perle hops. The Northern Brewer bitter hops were planted only on an area of 0.1 ha.

Weather conditions in spring and during the early summer initially were unfavorable. Eventually the situation improved by June/July. The harvest began somewhat late on August 24 and lasted until September 6. The entire crop which was classified first grade was sold to Swiss breweries. The growers received a price of sfr (Swiss francs) 630.00 per 50 kg; breweries paid sfr 480.00 per 50 kg. The balance between this price and the producer price was paid from the adjustment fund.

PORTUGAL

Before the harvest, the quantity was estimated at 310-320 t. The final result was distributed over the two growing regions as follows:

area	ha	Quantity harvested
Braga	80,3	165
Braganca	97,3	191
Total	**177,6**	**356**

The bitter values of Brewers Gold, the only variety planted, were 7.5 % in the Braga growing region and 8.5 % in Braganca. All Portuguese hops were taken over by the domestic brewery industry.

RUMANIA
BULGARIA

Only scant information on crop cultivation is obtainable from both of these countries. It may be assumed that Bulgaria slightly increased cultivation because of the increasing demand for beer. On the other hand, the harvest of both countries would appear to be somewhat below the preceding year's results due to poor weather conditions.

SOVIET UNION

There is still no official data available from this important growing country. In agreement with other reporters, we estimate the crop cultivation area at about 16,500 ha up to a maximum of 17,000 ha and the 1984 crop yield at 10,000 t.

HUNGARY

Initially the weather was cool and dry. Later it was still cool with sufficient precipitation. In July, 167 ha suffered considerable damage by hail. The harvest began a week later than customary at the end of August.
The total acreage in Hungary can be broken down over the following varietal groups:

Varietal group	ha	Quantity harvested/to
Aroma	245	181,6
Alpha	287	416,1

Aroma hops reportedly contained an average of 3.8 % alpha acid and bitter hops contained 7.2 %. The entire Hungarian harvest was taken over by the domestic brewing industry and is considered to be sold out.
The 1985 area is to be reduced slightly to a figure of 518 ha.

OTHER COUNTRIES

AUSTRALIA

Growth conditions varied in the individual growing regions. Nevertheless, the harvest increased 30% although the acreage was 118 ha smaller than in the year before. The bitter values averaged 10.3% and thus were also above last year's figure which was 9.4%. Only 4 t of the Australian crop are aroma hops while the rest are high alpha varieties, mostly Pride of Ringwood.

PEOPLE'S REPUBLIC OF CHINA

This country's increasing sales activities on the world market enable us to conclude that hop cultivation is being stepped up.
The cultivation region for export hops is located in Sinkiang (Mongolia), while the hops used for domestic purposes are being grown in Tientsin. The main variety is the grade referred to by No. 641 with an average alpha of 6.0% while No. 644 is reported to have bitter values between 6% and 7%. Only limited quantities of less than 100 t are available as far as this variety is concerned.
According to the latest official data, the 1983 beer output was 16.3 million hl and a figure of more than 20 million hl has been given for 1984. This corresponds to an annual increase rate of 20% which may be assumed also for the coming years on the basis of strong investments to be observed in the brewery sector.
Assuming a hopping rate of 225 g/hl of Chinese breweries abt. 4,500 tons of hops are required for domestic use while 5,500 tons are available for export.

INDIA

About half of the requirements of the Indian brewing industry can be met with a harvest quantity of about 180 t on a cultivation area of 325 ha. The varieties planted are Late Clusters and Hybrid-2. Efforts are also being made to introduce new varietal selections of aroma and high alpha hops.

The growing region in the Valley of Cashmere is located at an elevation of 1,800 m above sea level and, as far as its climatic conditions are concerned, it corresponds extensively to those prevailing in the Central European growing regions. A relatively cold winter between December and February was followed by a mostly wet spring. August is the hottest month with an average temperature of around 30°C. Because rainfall is scarce in the summer, the fields must be irrigated. In India, the hop harvest begins during the first week of August, in other words, somewhat earlier than in the European regions. Even today picking is still done manually.
Until a few years ago the price of hops was determined by supply and demand; today a committee made up of representatives from breweries, growers, scientists, and the government determine the price quotations that are to apply.

KOREAN REPUBLIC (SOUTH KOREA)

The harvest came to 591 t on an acreage reported to be 473.2 ha. This means that this country has once again increased its acreage. The hops have a bitter content of 5.4%.

JAPAN

A crop of 1,897.1 t was yielded on an area that was 32.6 ha smaller than the year before. A warm spring and two very hot months in June and July resulted in a better per-ha yield than the year before. Moreover, this year there were no typhoons to reduce the yield. As for the decline in the growing area, it must be kept in mind that, on the one hand, 70.9 ha were taken out of production while, on the other hand, 38.3 ha were newly planted.
The entire Japanese harvest was taken by the domestic brewing industry.

Here are the hop quantities for the individual breweries:

Brewery	Acreage	Production
Kirin	656,0	1.122,6
Sapporo	217,4	404,8
Asahi	180,5	347,0
Suntory	13,6	22,7
Total	**1.067,5**	**1.897,1**

Japanese hops are classified into three quality grades. Growers were receiving Yen 1.761 to 2.372 (= DM 1.100,– to DM 1.500,– per 50 kg) according to quality schedule.

NEW ZEALAND

The rather high per-ha yield of 2.35 t expresses the extraordinarily favorable growth conditions in this growing region for the 1984 harvest.

TURKEY

The 1984 harvest came to 360 t on an area that was 430 ha smaller. This quantity was divided in the Late Clusters and Brewers Gold varieties to the extent of 50% each. Alpha values for the Late Clusters were reported to have been between 5.5 and 7.5% and for Brewers Gold they were reported to have been 8%.
Part of the output is being processed into pellets while the rest goes to domestic breweries in the form of natural hops.

SOUTH AFRICA

The 1984 harvest was broken down over the individual varieties as follows:

	Southern Brewers Gold	Pride of Ringwood	Clusters	Total
Quantity/t	275	82	10	367
Acreage/ha	287	73	25	385

USA

Growth

During late Spring and early Summer growing conditions were normal with adequate moisture, except later in the year in Oregon. Weather up to and during harvest was not considered normal, as wind and hail damage occurred in Yakima and Idaho.

Yakima

Early Spring brought very inconsistent temperatures ranging from a low of 31° to a high of 90° within a few days. There was very little Spring precipitation, and early Summer weather patterns duplicated those of early Spring, with baby hops developing slowly due to cold temperatures. Occasional thunder storms and warm days with cool nights during late Summer benefitted hop ripening. Insects and mildew presentec' no major problems. Harvest was normal except as noted above with minor windburn to some hops due to heavy winds during harvest.

Oregon

Spring temperatures ranged from 74° to 32° with some wind. Heavy Spring rains caused Cascade and Willamette Hops to develop slowly. Fuggles and High Alpha Hops thrived and grew vigorously. Late Spring and early Summer saw cool temperatures and wet climate with subsequent outbreaks of Downy Mildew. The excessive rain was helpful in that it delayed bloom which allowed more plant growth. Beginning of July the weather changed and all hop varieties began improving from their slow start and made excellent growth. Late Summer no rainfall occurred with temperatures ranging between 97°-50°. Insects were held in check with spraying. What started out as an above normal rainfall year saw Oregon experience one of the longest dry spells ever recorded. No rain fell from July 1- September 7. Although the crop appeared excellent on the vine, the long dry spell apparently took its toll as the hops did not weigh out in baling as was expected.

Idaho

Early Spring temperatures were below normal and all varieties were about two weeks behind normal growth. Late Spring and early Summer saw temperatures over 100°. Rain and hail struck 1,500 acres of mostly Talisman. Growth improved but was not heavy. Pests and mildew were not a problem and harvest was normal.

California

California temperatures were hot and moisture was adequate. An average crop was produced on the small remaining acreage.

Quality

The picking quality was the best in more than 14 years. Hop color was below normal due to some dehydration caused by hot winds in late August and early September. Total Alpha production for the 1984 Crop was 2.113 metric tons which compares favorably with the 2.502 metric tons for the 1983 Crop when taken into account the 1984 hop production which was about 5,417 metric tons or 17.5% less than 1983.

The average Alpha Acids again increased to 8.3%. The sole reason for this is the increasing share of High alpha varieties.

Spot Market

First spot market sales were made in August at 40 - 45c per pound for Clusters and 60 - 70c per pound for High Alpha varieties. During September and October 1984 prices quickly dropped to 30c per pound for Cluster and 50c per pound for High Alpha hops. Beginning November all spot hops, Crop '84 were sold. Trading was generally slow for the approximately 4 million pounds sold by growers.

Contract Market

The contract market was almost nonexistent in the first nine months of 1984. Like in previous years, trades for future years were made mostly in conjunction with cancellations for crop 1984. A number of growers were unable to secure future contract coverage. Lacking any positive news from October to December, few contracts were entered into at again decreased prices.

Prices $/Lb. (Yakima Cluster)*

	84	85	86	87	88	89	90
January 84	0.85	1.05	1.25	1.30	–	–	–
February-May	0.75	–	1.10	1.15	1.20	1.25	–
July-September			no turnover				
October-December	–	0.80	1.00	1.15	1.20	1.25	1.30

* High Alpha varieties traded at a 5c premium over Clusters.

A further factor depressing the market were the all time high domestic hop stock figures as per U.S.D.A. September 1 Stock Report.

Hop Stocks as per September 1 in U.S.A.

1980	32,800,00 Lbs.
1981	34,430,00 Lbs.
1982	47,030,00 Lbs.
1983	60,580,00 Lbs.
1984	68,500,00 Lbs.

Average Price/Total Value Of U.S. Crop

1979	$ 0.97/lb	$ 53.614.000
1980	$ 1.50/lb	$ 114.194.000
1981	$ 1.52/lb	$ 119.220.000
1982	$ 1.75/lb	$ 136.884.000
1983	$ 1.94/lb	$ 131.483.000
1984	$ 2.15/lb	$ 120.526.000

While the average price per pound increased for the 17th year in a row, the total value of the Crop declined because of the smaller crop size.

Varietal Structure

The trend from Clusters, Bullion and Cascades in favor of new High Alpha varieties continues. High Alpha varieties now represent 24% of the total U.S. acreage and its share still continues to grow. Cluster acreage now represents 45%. The Oregon Cascade acreage has largely been converted into Fuggles and their Triploid relatives which now account for 75% of Oregon's acreage.

Acreage per variety and yield/ha in the U.S. hop growing areas are as follows:

Acreage per variety/%

	Washington		Oregon		Idaho		California		Total	
Variety	**84**	**83**	**84**	**83**	**84**	**83**	**84**	**83**	**84**	**83**
Clusters	55	60	3	2	34	33	100	81	45	48
Bullions	10	11	6	28	1	1	–	–	8	13
Cascades	10	13	9	16	5	11	–	–	9	13
High-Alpha	24	15	6	2	54	47	–	–	24	14
Fuggles	–	–	75	51	–	–	–	–	12	9
others	1	1	1	1	6	8	–	19	2	2
total	100	100	100	100	100	100	100	100	100	99

Acreage per variety/ha*

	Washington		Oregon		Idaho		California		Total	
Variety	**84****	**83**	**84**	**83**	**84**	**83**	**84**	**83**	**84**	**83**
Clusters	5.045	6.537	56	56	426	474	53	166	5.567	7.233
Bullions	886	1.219	128	711	15	15	–	–	1.029	1.945
Cascades	872	1.373	187	413	61	157	–	–	1.120	1.943
High-Alpha	2.206	1.588	125	49	677	679	–	40	3.008	2.356
Fuggles	38	30	1.484	1.316	–	–	–	–	1.522	1.346
Others	97	85	12	18	111	123	–	–	220	226
total	9.144	10.833	1.992	2.563	1.290	1.448	53	205	12.466	15.049

* Totals may not agree with addition of individual items because of rounding

** another 200 ha were strung but not harvested

Yield/ha (to)

	Washington		Oregon		Idaho		California		Total	
Variety	**84**	**83**	**84**	**83**	**84**	**83**	**84**	**83**	**84**	**83**
Clusters	2,3	2,2	2,5	2,8	1,9	2,4	1,6	1,6	2,3	2,3
Bullions	2,3	2,4	2,9	2,4	2,3	2,1	–	–	2,3	2,4
Cascades	2,1	2,2	1,9	1,8	1,8	1,7	–	–	2,1	2,1
High-Alpha	1,9	2,0	1,8	2,2	2,0	2,0	–	1,5	1,9	2,0
Fuggles	–	1,2	1,4	1,5	–	–	–	–	1,4	1,3
Others	2,0	1,3	1,6	1,6	1,4	1,2	–	–	1,9	1,2
total	2,2	2,2	1,6	1,8	2,0	2,0	1,6	1,6	2,1	2,1

Crop (to) 1984*

Variety	Washington	Oregon	Idaho	California
Clusters	11.565	141	795	85
Bullions	1.998	370	34	–
Cascades	1.839	368	107	–
High-Alpha	4.121	215	1.357	–
Fuggles	–	2.061	–	–
Others	195	19	160	–

* Addition of the individual items was avoided, since conversion of lbs into tons would distort totals.

Hop Marketing Order

Early in July 1985, the U.S. Department of Agriculture approved the rate of 97% of the so-called "saleable quantity of the base increment" from the 1985 harvest as proposed by the Hop Administrative Committee.
As for the more distant future of the Hop Marketing Order, a public hearing procedurs was carried out in June 1984. Following analysis of the documents submitted, the U.S. secretary of agriculture decided – through publication in the Federal Register of June 26, 1985 – to terminate the market order existing since 1966 effective 31 December 1985.

HAC = Hop Administrative Committee

U.S.D.A. = U. S. Dept. of Agriculture

Crop 85

AUSTRALIA

VICTORIA

Harvest commenced in Victoria on the 27th of February 1985 and was completed on most hop farms by the 23rd of March. The crops varied from very good (record breaking yields) to only average. The alpha levels were generally down on the previous season's average of over 11% (range 8.5% - 11%) although a few growers maintained the 11% level. What remains a mystery is how growers can have similar alpha levels in one year and dramatically different alphas the following year. The hot dry season was compensated throughout by irrigation (there being adequate river and stored water) and marred only by a kiln fire on one farm. This fire started somewhere in an old kiln, cause unknown, after drying had been completed for the season. A second fire occurred with some baled hops being stored at ambient temperature in Melbourne. Fires in baled hops also occurred in North Eastern Tasmania and in South Africa under similar circumstances.

SOUTHERN TASMANIA

The harvest in this area commenced on the 18th of March, following what was again described as a very favorable growing season. All growers achieved their targeted production with a minimum of effort. As with the other areas in Tasmania, alpha levels were lower than usual (range 8.0%-10%) and many of the earlier picked hops looked very immature. It had appeared that some of the growers had started picking too early but this notion disappeared rapidly as the crop changed to an over-ripe state very quickly toward the end of harvest. Most growers had finished harvest by the 3rd of April.

NORTH EASTERN TASMANIA

A generally very good growing season resulted with all growers achieving their targeted production. Most growers achieved this on reduced acreage and with reduced levels of fertilizer and other inputs. What was disappointing was the generally lower alpha levels (range 8.5% - 10.5%) than previous seasons. The specific cause of this is unknown but the unseasonal cool weather experienced for the few weeks before and during harvest will no doubt attract most of the blame.

NORTH WESTERN TASMANIA

The hops in this area looked magnificent in January and early February. The vines had grown vigorously, had good lateral development and there was plenty of burr. For some reason, again specific cause unknown, this excellent start did not translate into a big crop. Some experts believe the main cause is that they are attempting to grow the crop in a seedless condition and this does not suit this particular micro climate and area. The alpha levels were also disappointing (range 8.5% - 9.5%) and are well below the figures obtained in the first two years of operation.

SOUTH AFRICA

A growing area of 413 ha has been reported for the 1985 harvest. That includes 212 ha on the brewery-owned farms of South African Breweries. The harvest has been estimated at 511 t.

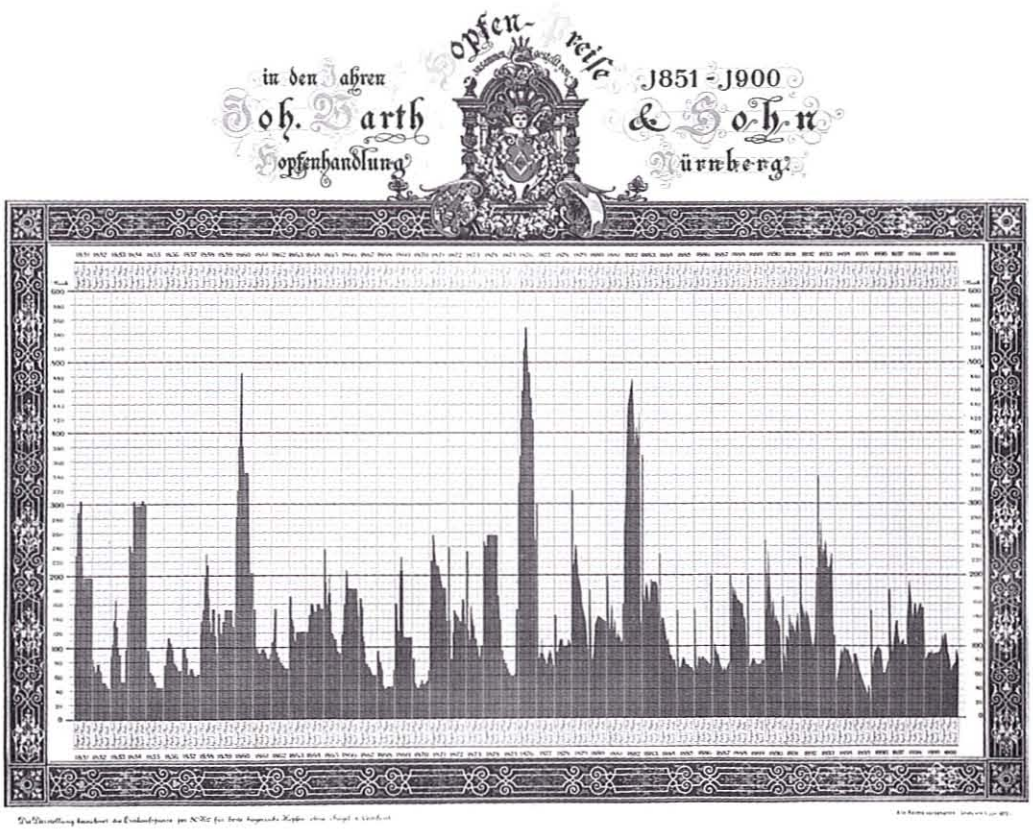
A dry spring was followed by excellent rain in January, changing what was potentially a disasterous season into a good one. The crops grown on both South African Breweries farms and contract growers farms gave some of the best yields in 25 years. The alpha levels continued to be very good with Pride of Ringwood averaging over 10.5% and Southern Brewer approximately 9.5%. The length of time that it takes to harvest hops in South Africa continues to be of great concern. Harvesting, which commenced in mid-February, was not completed until the first week in April. This, of course, has a detrimental effect on the appearance of the last picked hops.

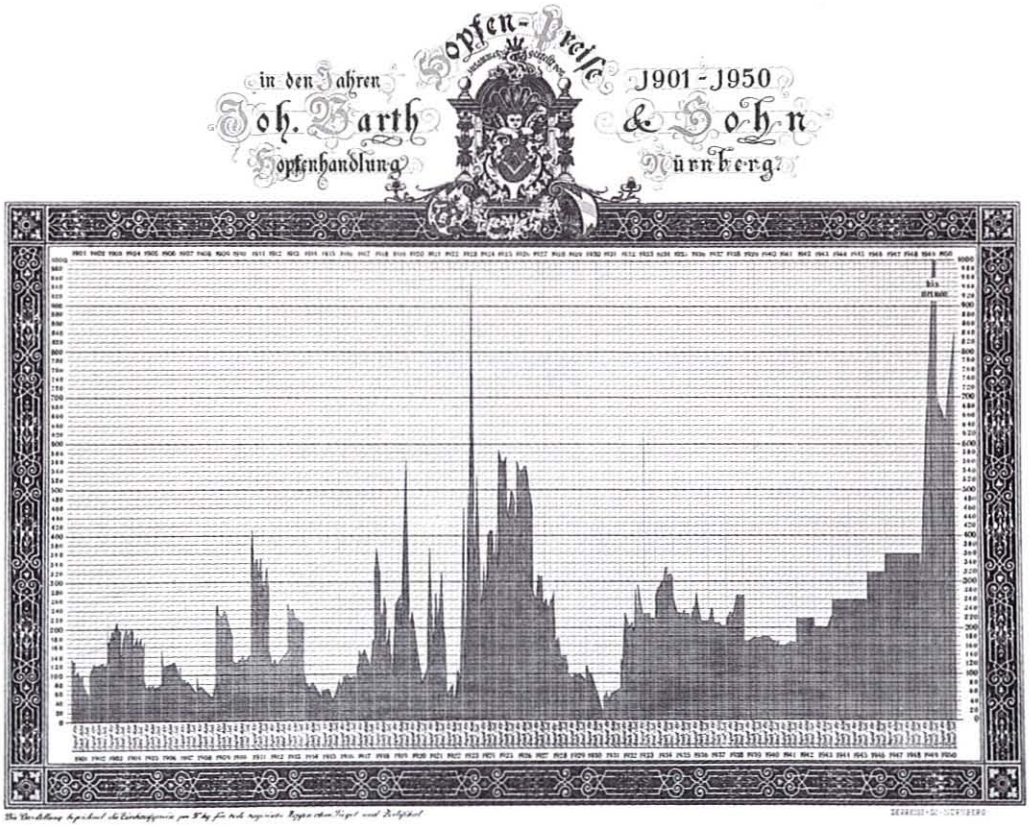
NEW ZEALAND

Hop growers in New Zealand have enjoyed an excellent season, with a dry spring being followed by good rains in January and early February. Late February and March were warm and very dry, which helped ripening of the hops and enabled a smooth, uninterrupted harvest. The final result was a crop of above-average yield and consistent alphas of over 13%.

European Growing Regions

Growing conditions in the European regions were outstanding as we go to press with this report. Even a relatively cool spell during June did not influence the generally good crop inventory in a disadvantageous manner. As to the acreage, we expect only minor changes compared to the preceding year. Acreage in the EC will probably shrink by just about 1,000 ha while Czechoslovakia will increase its area by about 200 ha. Unfortunately no figures are available for the USSR.





HOPS – GREEN GOLD?

In certain years, hops can really be said to be worth their weight in gold and in that case yield excellent profits.

On the other hand an old proverb says "der Hopf ist ein Tropf" (the hop is a fool) and thus it characterizes the hop as being somewhat mysterious both as a plant and as a commercial product. A shortage runs up prices to extreme heights whereas overproduction results in prices which no longer cover growers' production costs.

Hop prices have always been determined by supply and demand, but statistics for the years 1851 – 1900 and 1901 – 1950 clearly show that also political and economic events of world-wide impact have a decisive influence on hop market development.

Our prices are per zentner spot hops = 50 kgs Hallertau hops ready packed.