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HOPFEN

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Hop Report 1952/53

The hesitating attitude of the world economy is reflected by the downward trend of quotations for the most important raw materials. This development tended to benefit industrial countries whereas producers of raw materials experienced a decrease in purchasing power. Present indications seem to show that a lowest level of prices has been reached.

**Economical
Situation**

The German balance of exchange showed a small excess in 1952. Balances in favour of Germany within the EPU (European Payments Union) approached the upper limits of the swing so that further liberalisations of trade were possible. The German government are considering a free convertibility of the D-Mark. The Dollar gap, however, has not yet been bridged.

The reconstruction of the German economy continues to be hampered by considerable lack of capital which in turn decreases the competitive chances of Germany in the world markets.

An *Increased Production* of beer during 1952 as compared with 1951 is shown in the following countries: Australia 7 %, Belgium 4 %, Canada 11 %, Chile 21 %, Germany 8.5 %, France 12 %, Italy 23 %, Japan 8.5 %, Luxembourg 2 %, New Zealand 4 %, Netherlands 1/2 %, Norway 3 %, Austria 33 %, Portugal 3 %, Saar 8 1/2 %, South African Union 7 1/2 %, South West Africa 10 1/2 %, Sweden 4 %, Switzerland 11 1/2 %, Spain 50 %, Thailand 33 %, Turkey 8 %, USA 1 %.

A *Lower Production* in 1952 as against 1951 is to be noted in: Denmark 2 %, Ecuador 2 %, Great Britain 1/2 %, Finland 1 %, Iran 8 1/2 %, Ireland 1 1/2 %, Iceland 6 %, Jugoslavia 22 %.

Production of beer

1 ha = 2.934 bayr. Tagwerk,	1 bayr. Tagwerk = 0.341 ha
1 ha = 2.471 acres	1 acre = 0.405 ha
1 Liter = 0.2642 gall. (USA.)	1 gall. (USA.) = 3.7835 Liter
1 Liter = 0.2201 gall. (Brit.)	1 gall. (Brit.) = 4.5435 Liter
1 hl = 100 Liter = 26.42 gall. = 0.8523 bbl. (USA.)	1 bbl. (USA.) = 31 gall. = 1.1734 hl
22.01 gall. = 0.6114 bbl. (Brit.)	1 bbl. (Brit.) = 36 gall. = 1.6356 hl
1 kg = 2.20462 lbs.	1 lb. = 0.45359 kg
1 shortton (sht) = 2000 lbs.	= 907.185 kg
1 longton (lgt) = 2240 lbs.	= 1016.048 kg
1 metr. Tonne = 20 Ztr. = 1000 kg = 1.10231 shorttons = 0.98419 longtons	
1 Ztr. = 50 kg = 110.23 lbs = 0.984 cwt. (Brit.)	1 cwt. (Brit.) = 112 lbs. = 50.8 kg = 1.016 Ztr.
1.102 cwt. (USA.)	1 cwt. (USA.) = 100 lbs. = 45.36 kg = 0.9072 Ztr.
1 quarter (qr) = 400 lbs. = 181.44 kg (barley)	1 Ztr. = 0.27555 qr.
48 lbs. = 21.77 kg (barley, malt)	1 Ztr. = 2.2965 bu.
1 bushel (bu) = 56 lbs. = 25.4 kg (corn, milocorn)	1 Ztr. = 1.9685 bu.

DM 1.— = US \$ —.23809 / DM 4.20 = US \$ 1.— / US \$ 2.80 = DM 11.76 = £ 1.—.—

Bank Notes at Zurich 6/1/53: US \$ 1.— = DM 4.49 / sfrs. 1.— = DM 1.04 / £ 1.—.— = DM 12.05

1 mm precipitations = 1 Ltr. of water per m², 1 mm = 0.04", 1" = 25 mm.

Production of beer 1952

Country	1000 bbl. of 31 gall. each	Country	1000 bbl. of 31 gall. each
U. S. A.	90,498	Norway	557
England	34,851	Peru *)	511
Germany West 22,704		Indochina *)	384
East 4,261	26,965	Singapore *)	315
U. S. S. R. *)	11,506	Luxembourg	299
Belgium	10,970	Algiers *)	256
Canada	7,938	Morocco *)	256
Czechoslovakia *)	7,671	Bolivia	245
France	7,202	Turkey	193
Australia	6,935	Greece *)	170
Brazil *)	6,392	Indonesia *)	170
Mexico *)	5,114	Ecuador	137
Argentina *)	3,409	French West Africa *)	136
Columbia *)	3,239	Kenya *)	136
Austria	3,228	Portugal	114
Denmark	2,807	Egypt *)	85
Poland *)	2,642	Tunis *)	77
Ireland	2,576	Dominican Republic *)	60
Japan	2,500	Paraguay *)	47
Sweden	2,328	Nigeria *)	38
Switzerland	2,008	South West Africa	36
Italy	1,399	Mozambique *)	36
Netherlands	1,372	Cameroons *)	34
New Zealand	1,268	Tanganyika *)	34
Cuba *)	1,065	Iran	27
Venezuela *)	938	French Equatorial Africa *)	26
Union of South Africa	927	Ivory Coast *)	26
Spain *)	916	Costa Rica	25
Finland	914	Thailand	17
Chile	912	Uganda	14
Jugoslavia	786	Martinique *)	13
Uruguay *)	682	Iceland	8
Belgian Kongo *)	580	India *)	8
Saar	557	Pakistan	6
		Madagaskar *)	4

*) = estimate

Production of beer in Western Germany during the calendar year 1952 amounted to 22,031,280 bbls.
Output in the Western Sectors of Berlin for the same period was 672,517 bbls.
Total 22,703,797 bbls.

The above figures include 373,362 bbls. delivered taxfree to the occupation forces (1951 = 298,386 bbls.) and exports including sales against foreign currency within Germany totalling 357,654 bbls. (1951 = 346,149 bbls.).

**Barley
Situation 1952**

Total necessities of barley for the brewing industry in Western Germany during the 1952 season were estimated as from 700 to 750,000 tons. This quantity cannot be produced on German farms. Imports of more than 280,000 tons mostly from Denmark, were approved in order to ease the market. These imports not only covered the anticipated deficit but even rendered difficult the sale of part of the home production. Prices for malting barley reached a notable low during the spring of 1953 and stood at times under the official parity of D-Mark 41.50 per 100 kilos. At that time the German brewing industry was called upon to take out of the market the balance of malting barley still unsold in farmers' hands.

**Growth of the
Hop Crop 1952
in Germany**

The winter of 1951/52 was mild. The UNCOVERING and CUTTING of the hops was retarded by rainy and cold weather with occasional snowfalls during March 1952. Spring work started in the beginning of April 1952 and was finished during the second half of that month under more favourable conditions.

Abundant MOISTURE stimulated a rapid growth as soon as warmer weather set in. During the very changing weather in 1952 it was shown that early uncovered gardens had the best development until the middle of July 1953. From that time on, however, a better vegetative development was evident in gardens which were not too early cut.

Cool weather during May and June 1952 did not stimulate the hops. APHIDS had to be controlled and preventive sprayings against DOWNY MILDEW were applied. Warmer weather with welcome precipitations about the end of June benefitted the plants which, however, were not well protected against hot weather and drought during the month of July. In some parts farmers worked exceedingly hard to avoid drought damages by manual irrigation of the hop yards. During this time, there was considerable danger from attacks of RED SPIDER. This pest had to be carefully controlled.

The general aspect of the hop gardens was not uniform. BURRS were less plentiful than the year before, but timely precipitations benefitted both the BLOOM as well as the FORMATION OF THE CONES.

PICKING began about the end of August 1952 and was generally favoured by good weather. A good middling crop could be harvested. Hops of crop 1952 in general were satisfactory both in colour and aroma. Bitter values were not as high as in 1951, but the hops showed a more uniform growth so that the range of qualities was narrower than the year before. Continued rains and humid weather during September 1952 made drying difficult and retarded shipments of the hops.

In the HALLERTAU spring work was delayed by rain and snowfalls until the beginning of April 1952. UNCOVERING and CUTTING was general about April 7th, 1952 and was finished towards the end of April under favourable weather. Many hop yards showed missing hills as a consequence of DAMAGE BY GRUBWORMS.

Weather was good for the hop plants in the beginning of May while colder weather during the end of May retarded growth. Sprayings against DOWNY MILDEW were effected, whereas there was no danger from RED SPIDER in consequence of the weather. About this time several yards showed drooping and wilting vines as a consequence of CAUTERIZATION through insecticides applied against grub-worms.

Precipitations and warm weather during the month of June 1952 were favourable for growth. EARLY BLOOM was to be seen in some parts already by the end of June. The general aspect of the crop at this time was still unequal. The weaker gardens, however, had taken advantage of weather conditions and the general stand of the crop had improved.

Hot and dry weather in the beginning of July was very good for the hops and notably so for the weaker gardens. Intensive SUNSHINE stimulated a rapid growth so that the hops quickly attained the height of the trellises. From the middle of this month onward, however, damages by drought were noted especially in gardens on lighter soils. Welcome precipitation during the last decade of July 1952 somewhat refreshed the plant but failed to have any notable influence upon the BLOOM. Timely rains during the first half of August increased the prospects of the crop. The FORMATION OF THE CONES was not very uniform. RED SPIDER remained a constant danger most especially in the districts of *Pfeffenhausen* and *Siegenburg*. PICKING began sporadically on August 21st, was general on August 24th, and was finished under favourable weather conditions about two days earlier than usual.

Weather data from the Experimental Hop Farm Hüll/Hallertau							
1952	March	April	May	June	July	August	September
Precipitations per month (mm)	114	33.2	46.6	97.4	13.9	54.0	127.1
Monthly average of air temperature ° Celsius	3.0	9.4	12.0	15.9	19.2	18.5	10.4
Maxima of air temperature ° Celsius	14.8	23.0	27.0	31.6	35.0	35.5	23.0
Minima of air temperature ° Celsius	— 7.9	— 6.5	— 2.3	4.6	6.1	3.1	— 0.6
Monthly average of relative air humidity %	82	79	74	74	63	70	82
<i>Other data:</i>							
Hoar-frost	8 days	2 days	2 days	—	—	—	1 day
Thunderstorm	1 day	1 day	2 days	2 days	1 day	3 days	1 day
Snowfall	2 days	2 days	—	—	—	—	—
Wind Force 6	—	—	—	—	—	1 day	2 days
Wind Force 8	—	—	—	—	—	—	2 days
Hail	—	—	—	1 day	—	—	1 day

The Hallertau hops crop 1952 had smaller cones than in the preceding year. The colour was generally green and fresh. Lupulin was of light colour and good aroma and was amply present.

Acreege, Yield and Production 1951 and 1952

	Acreege 1951 Acres	Yield Pounds	Production 1951 Pounds	Acreege 1952 Acres	Yield Pounds	Production 1952 Pounds
Hallertau	12,083	1,708	20,638,253	12,496	1,279	15,983,350
Spalt	2,046	1,485	3,038,049	2,093	1,106	2,314,830
Hersbruck	1,490	1,144	1,704,156	1,530	1,081	1,653,450
Jura	215	965	207,563	227	806	182,982
Bavaria	15,834	1,616	25,588,021	16,346	1,232	20,134,612
Tettngang	1,515	1,423	2,155,878	1,557	1,395	2,171,531
R. H. W.	558	778	434,086	558	899	501,547
Baden	45	1,536	69,114	49	1,471	72,090
Rheinpfalz	69	960	66,248	99	707	69,996
Germany	18,021	1,571	28,313,347	18,609	1,233	22,949,776
Saaz (Zatec)						
Auscha (Ustek)						
Other Districts						
Czechoslovakia	20,262	571	11,574,150*)	20,509	399	8,818,400*)
Alsace	2,434	1,359	3,306,900	2,471	1,115	2,755,750
Dep. Côte d'or	371	891	330,690	432	383	165,345
Northern France	556	1,487	826,725	556	991	551,150
Lorraine	74	596	44,092	74	596	44,092
France	3,435	1,312	4,508,407	3,533	995	3,516,337
Alost	507	1,560	790,900	531	1,785	947,978
Poperinghe	1,149	1,784	2,050,278	1,125	1,337	1,504,640
Vodelée	17	1,589	27,007	17	1,167	19,841
Belgium	1,673	1,714	2,868,185	1,673	1,478	2,472,459
Slovenia	3,773	685	2,583,240	3,780	678	2,563,950
Baclta	445	372	165,345	445	149	66,138
Jugoslavia	4,218	652	2,748,585	4,225	623	2,630,088
Poland	1,482	744	1,102,300*)	1,483	669	992,070*)
USSR	4,942	669	3,306,900*)	6,178	892	5,511,500*)
Continent	54,033	1,007	54,421,874	56,210	834	46,890,630
Kent	12,644	1,755	22,196,244	12,479	1,429	17,833,561
Hants	680	1,473	1,001,550	667	1,433	955,694
Surrey	116	1,608	186,619	121	1,309	158,400
Sussex	2,130	1,492	3,178,151	2,095	1,148	2,405,439
Hereford	4,683	1,376	6,442,944	4,715	1,502	7,081,947
Worcester	2,152	1,339	2,881,963	2,145	1,431	3,070,126
Other Counties	54	1,615	87,192	54	2,151	116,182
England	22,459	1,602	35,974,663	22,276	1,420	31,621,349
Europe	76,492	1,182	90,396,537	78,486	1,000	78,511,979
Washington	15,301	1,790	27,386,974	14,912	1,734	25,852,021
Oregon	14,900	1,260	18,774,043	12,810	1,309	16,767,967
California	9,501	1,530	14,535,038	9,007	1,674	15,075,055
Idaho	1,500	1,695	2,543,006	1,601	2,229	3,568,035
USA	41,202	1,535	63,239,061	38,330	1,598	61,263,078
Quebec	22	271	5,952	22		
Ontario	91	385	35,053	92		
Brit. Columbia	1,483	1,414	2,096,795	1,551		
Canada	1,596	1,339	2,137,800	1,665	1,502	2,500,016*)
Tasmania	1,272	1,961	2,496,709	1,310	1,310	1,716,171
Victoria	356	1,104	391,978	249	1,374	342,044
Australia	1,628	1,774	2,888,687	1,559	1,320	2,058,215*)
New Zealand	615	2,034	1,251,000	615	1,489	916,011*)
Japan	1,262	787	994,275	1,878	991	1,860,683
Manchuria	470	704	330,690*)	247	669	165,345*)
Argentina	87	988	85,980	191	519	99,207*)
South-Africa	470	566	265,985	470	586	275,575*)
Total	123,822	1,305	161,590,015	123,441	1,196	147,650,109

*) = estimate

Spring work in the SPALT DISTRICT began about April 10th, 1952, and was finished about the end of that month. There were some damages by WIREWORMS and FUSARIUM. In some parts FLEAS were rather more apparent than usual. Weather was favourable until the first half of May while the second half of that month was too cold so that even FROST DAMAGES were noted in some gardens. Development of the hops progressed very well during the month of June, offsetting the effects of retarded growth during the spring of 1952. The plants attained the height of the trellises in some yards already during the second half of June. Laterals were plentiful and the general stand of the crop was satisfactory. There was a good growth under warm weather in June and until the middle of July, although nights generally were cool. Precipitations were not sufficient for the development of the plants. Many yards did not overhang the trellises at that time.

BLOOM was general during the second half of July 1952 and there were some signs already of the FORMATION OF THE CONES. It was necessary to spray against RED SPIDER and APHIDS. The lack of rain was very much felt but precipitations refreshed the plants not sooner than in the beginning of August. This brought the necessary humidity for the formation of the cones so that the overall development was improved.

PICKING began on August 20th and was in full swing on August 25th. The crop was smaller in cones than in 1951 but of good colour, very rich in lupulin and of good aroma.

After a long and late winter in TETTANANG there resulted a very quick and sudden warmth and a consequently rapid start of the crop. Spring work was finished during the second half of April. Late cut yards suffered from FLEAS during the month of May. Rain at the end of this month further stimulated growth and retarded the development of RED SPIDER.

Humid and rainy weather in the beginning of June 1952 favoured attacks of DOWNY MILDEW. Vegetative development of the crop was stimulated by dry weather in July and the general aspect at this time was satisfactory. There was a good development of BLOOM and CONES in spite of the dry spell which was broken by precipitations at the end of July and the beginning of August.

PICKING began on August 15th and was general on August 18th. There was no scarcity of pickers and the harvest was quickly finished under favourable weather conditions. The quality of the hops was improved by sufficient rains during the growth. The cones were better developed and ripened than in 1951. Lupulin was very good and amply present. Cleaner picking than in 1951 can be noted.

ROTTENBURG-HERRENBERG-WEILDERSTADT. In this district a snow cover remained present in the more hilly parts until the middle of April 1952. The belated uncovering and cutting, however, showed that the plants had come well through the winter. Warm weather benefitted the start of growth. Limited HAILS did no appreciable damage but the plants were hurt by GRUBWORMS in certain districts. During the last decade of May the weather turned to windy and cold until frost, and growth was retarded. Warm and humid weather since the end of May tended to offset this.

RED SPIDER began to develop with dry and warmer weather in July. Laterals were generally well developed. Most gardens had reached the height of the trellises and showed an overhang while a sprinkling of weaker yards was present. Early gardens showed BLOOM during the middle of July under continued dry and hot weather. Rain would have been very welcome at that time. The beginning of the FORMATION OF THE CONES was to be noted on early varieties at the end of July under dry and hot weather with cool nights. Middling early hops were in full bloom and late varieties showed the first bloom. Scant precipitations brought a desired refreshing for the bloom and cones in the beginning of August. High winds occasioned damages to the crop in some parts.

There were some precipitations about the end of August. PICKING of early varieties began about August 25th, while the harvest of late hops began about September 3rd. The crop was gathered in under generally good weather conditions. The dry and hot growth during 1952 resulted in small cones which, however, were good in colour and lupulin and had a fine aroma.

HERSBRUCKER GEBIRGE. The rainy weather during March 1952 retarded the beginning of spring work until April 7th which was not finished until the second half of that month. FLEAS were negligible and did no damage. Cool weather during the second half of May and occasional FROSTS were not favourable for the hops.

Warmer weather and precipitations in June 1952 resulted in a better vegetative development. The general aspect of the gardens, however, was still very unequal. RED SPIDER was favoured by hot and dry weather during the second half of July and had to be constantly controlled. First BLOOM was shown on early varieties about July 20th and was very much in need of rain. In the beginning of August BURRS and BLOOM were judged to be not so plentiful as during the year before. Welcome rains favoured development. There were STORM DAMAGES in some yards. Early varieties had finished the DEVELOPMENT OF THE CONES during the second half of August, whereas late hops at this time began to form the cones.

PICKING began sporadically about August 25th and was in full swing on September 1st. The harvest was finished by the middle of September and was interrupted and retarded by rains. Hersbruck hops were not always as satisfactory in colour as in 1951. There was a wider range of qualities than the year before and the hops were not so rich in lupulin as had been expected. Bitter values, however, were high.

Picking under rain may have been partially responsible for the fact that most notably in 1952 hops were delivered insufficiently dried in the district of Hersbrucker Gebirg. This fact increased the possibility of damages to the quality and quite often the regular work in the warehouses was upset as these hops had to be specially treated when in danger of deterioration.

**Bitter values
of crop 1952**

Analyses in hand for hops of various origins show the following results:

Origin	Total resin content anhydric	Soft Resins %	Humulon %	Lupulon + Fractions of soft resins %	Hard resins %	Bitter value (Wöllmer)
Hallertau	16.31	13.57	83.21	6.15	37.70	7.0
Spalt	17.55	14.34	81.70	5.94	33.85	6.9
Tettngang	17.09	12.08	70.68	5.87	34.34	6.6
Wurttemberg	16.60	12.57	75.72	5.06	30.48	5.9
Hersbrucker Gebirge	16.67	13.97	83.91	5.61	33.71	6.6
Alsace	15.71	13.02	82.80	6.30	40.08	7.0
Burgundy	17.96	13.53	75.31	2.21	12.30	3.5
Northern France	15.08	12.13	80.35	0.96	6.31	2.2
Alost	16.30	12.20	74.84	4.58	28.10	5.4
Poperinghe	15.70	12.90	82.17	3.69	23.50	4.7
Saaz	17.56	12.59	71.70	6.93	39.48	7.6
Raudnitz	17.59	12.29	69.85	6.53	37.11	7.2
Jugoslavia	14.14	10.06	71.15	5.69	40.24	6.2
English Fuggles	16.84	9.19	54.66	0.95	5.65	1.9
Spain	17.33	11.25	64.90	3.79	21.88	4.6
US Seedless California	22.99	13.19	57.39	7.03	30.59	7.7
US Seedless Idaho	21.07	16.53	78.47	6.28	29.80	7.4
US Semiseedless Idaho	16.55	14.26	86.15	4.08	24.66	5.2
US Seeded Oregon	18.52	15.26	82.39	0.88	4.76	2.5
Argentina	15.58	14.84	95.25	3.96	25.41	5.2
Japan Nagano	19.70	16.10	81.70	6.20	31.50	7.3

**Quotations
for crop 1951**

Slow trading during the months April to September 1952 resulted in a decrease of quotations for Hallertau hops crop 1951 from DM 500/520.— until DM 475.— per 50 kilos. There was somewhat more demand for Hersbruck hops crop 1951 which were traded at equal prices with Hallertau hops in August 1952. The last remaining lots of German hops of the old crop 1951 were purchased by consumers during the month of September 1952.

Crop estimate 1952

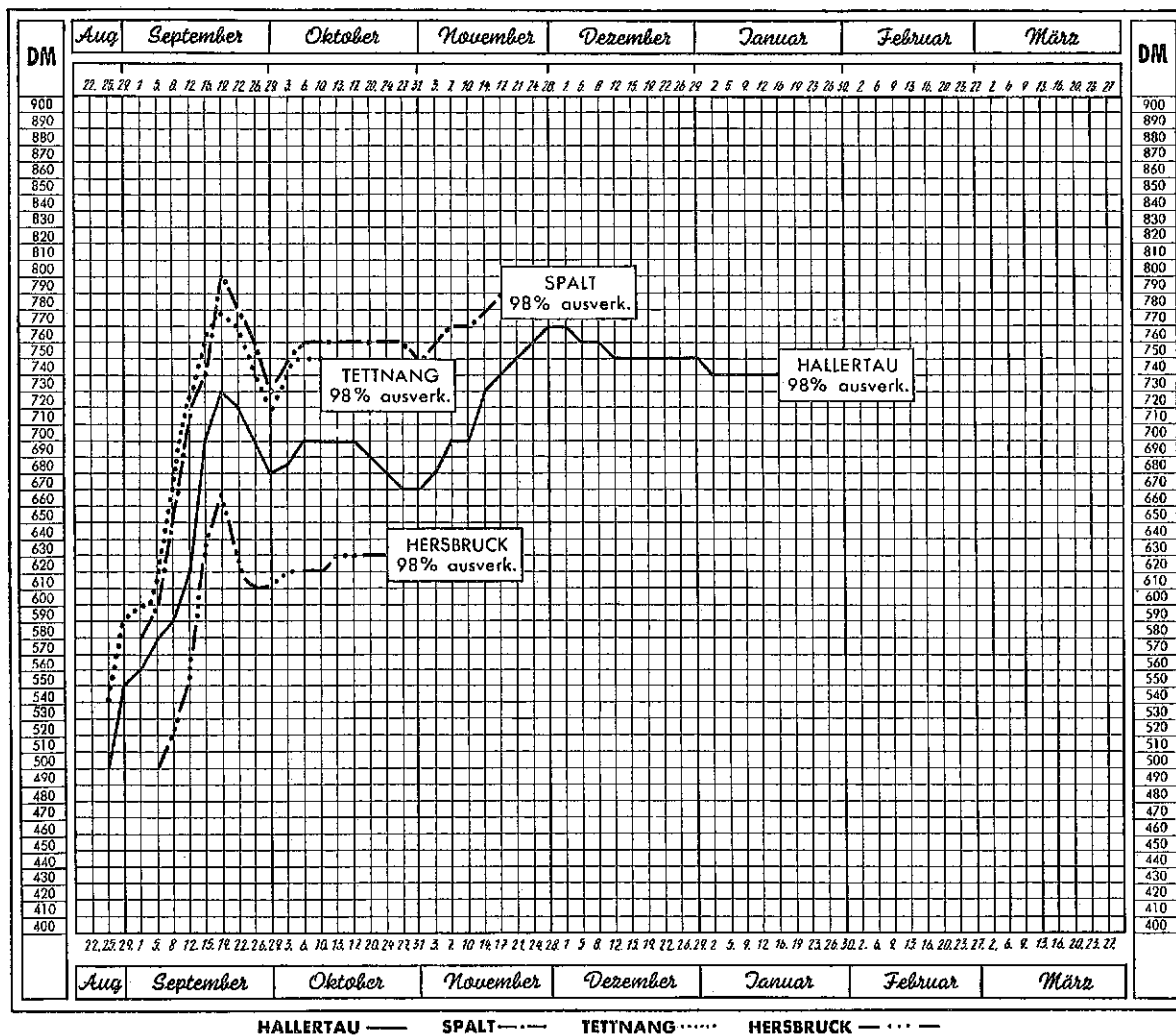
The annually nominated commission gave an estimate for crop 1952 as from about 25,005,675 lbs. up to 26,769,355 lbs. Even the lowest limit of this estimate has not been attained as the result of 1952 is about 23,148,300 lbs. A closer look at the estimates shows that the difference is found most especially in the figures relating to the Hallertau. An explanation for this may be found in a very rapid harvest which in many instances did not allow for the full ripening of the crop. Furthermore, damages by grubworms and cauterization may have been greater than originally estimated, and finally the damages by Red Spider, especially in gardens on lighter soils in the Hallertau, will have contributed to the smaller result of crop 1952.

**Hop Conference
1952**

The annual meeting of the BELF (*Bundesministerium für Ernährung, Landwirtschaft und Forsten*) was held in Nürnberg on September 4th, 1952. The German brewing industry indicated a demand of 18,739,100 lbs. hops crop 1952, as against a real purchase of about 12,676,450 lbs. (stand June 1953). During this meeting a limitation of exports was not approved.

The general nervousness in purchasing of hops crop 1952 may be compared to similar situations during the years of scarce hops. There was a considerably intensified purchase on farms by breweries. Brewers generally paid farmers more than corresponded to the market situation. In such a seller's market the trade was forced to follow the general upward trend. From the end of August until the middle of September 1952 prices were boosted by more than 200 DMarks per 50 kilos under sometimes hectic trading. This price level which had to be considered as much too high was maintained until the end of October, some oscillations and some days with lower tendencies notwithstanding. Considerable purchases for export in the beginning of November 1952 made for another increase in quotations.

Hop purchases
crop 1952



Development
of quotations
crop 1952

There was a considerable uncertainty about the formation of quotations in this district as late as the end of August 1952. First purchases were hesitatingly effected within a range of DM 520/580.—. Prices asked by farmers increased rapidly until DM 600.— while breweries in direct purchases paid up to DM 650.— first cost. Developments in the districts of Tettwang and Spalt resulted in comparable increases of prices in the Hallertau which soared to DM 730.— by the middle of September 1952.

Hallertau

The market remained firm although purchases dwindled to insignificance. Prices oscillated around DM 700.—. New purchases about the beginning of November resulted in prices asked by farmers up to DM 770/780.—. Stocks in first hand were sold out about 90—95 % by the middle of November 1952.

Trading opened with limited sales on the basis of DM 580.—. Quotations jumped within a very few days from DM 600.— to the top quotation of DM 800.—.

Spalt

Slower trading resulted in a decrease of prices until DM 720.— for a short time about the end of September. The last remaining important lots changed hands by the middle of October on the basis of DM 750/780.—. Trading was negligible in November for lack of merchandise.

Tettngang

Trading began slowly by the end of August on a basis of DM 540/580.—. During the first half of September purchasing was very brisk and prices rose until DM 770.—. It was possible to purchase somewhat more favourably by the end of September when all markets were relatively quiet. The volume of trading, however, remained small as Tettngang was already sold out to a considerable extent.

It may be noted that during the most important time of purchasing, quotations in Tettngang always were about six hours in advance of prices in Spalt.

**Hersbrucker
Gebirge**

Quotations started by the end of August on a basis of DM 450.—. The general trend on the other markets carried prices here along as well, which rose until DM 500/520.— during the second week in September, to attain DM 600/620.— by the middle of that month. This level was maintained under subsequent slow trading. The last remaining lots were sold in October.

Nurnberg Market

Quotations on the market in Nürnberg had no relation to prices submitted to breweries. For this reason, the volume of trading in the Nürnberg market was smaller than in former years. Quotations during January/February 1953 were DM 785/790.— for Hallertau hops, DM 720.— for Hersbruck and DM 820/835.— for Tettngang and Spalt. These prices declined about DM 30.— during March. The general calmness of the market caused a further decrease of quotations in April 1953. About the end of that month Hallertau hops were sold at DM 650.—, Hersbruck at DM 600.— and Spalt hops at DM 750.—. It became apparent that there still remained considerable unsold quantities in second hands, whereas farmers were sold out with the exception of small lots. Holders of hops became very eager to find a home for their unsold stocks, which resulted in a quick decrease of prices as consumers at home and abroad had in the meantime replenished their inventories with cheaper hops from other origins. Hallertau hops were quoted at DM 620.— by the middle of May and DM 510.— only a fortnight later. At that time Hersbruck hops were priced at DM 470.— and Spalt hops DM 630.—.

Hallertau hops fell further until DM 450.— by the middle of June 1953. This attractive quotation increased demand and existing stocks were considerably reduced.

It is to be hoped that the last remaining quantities of crop 1952 may be sold before the new crop 1953 is harvested.

Market Survey

The unstable development of the German hop market for crop 1952 has been a reverse to the German hop industry which up to then had progressed nicely. The figures for export show a regrettable setback. It became evident that the area under cultivation in Germany was too small to satisfactorily supply and inform the brewing industry both at home and abroad under average harvest conditions. The hectic increase of quotations in Germany appeared excessive and unjust when contrasted to the weak market in the USA. A number of breweries in Germany and abroad tried to calm the market by refraining from purchases. Isolated actions of this kind, however, could not alter the underlying strong tendency of the German market during the principal part of the purchasing season.

Imports of American hops crop 1952 probably have stopped further increases of quotations in Germany. Existing tendencies in some countries to become independent from hop imports were stimulated once again. There have resulted in some respects already losses for the German hop export which cannot be offset again.

The strong decreases in quotations for German hops at the close of the season 1952/53 are a result of the countereffects which appear automatically as soon as one group of trading partners is at a disadvantage. It must not remain unconsidered that breweries abroad always have the possibility to avail themselves of cheaper hops of other origins. This is a constant reminder of the fact that there is no monopoly for agricultural products.

**Marketing
Agreement**

Market developments since April 1953 have resulted in demands from farmers' circles for a marketing agreement and stable prices. Disappointing experiences in former years, however, related to planned economies of any kind do not seem to point favourably to possibilities for a marketing agreement for hops in Germany.

The Board of Arbitration presided by representatives of the *Ministerium für Ernährung, Landwirtschaft und Forsten* delivered its decision on August 12th, 1952. All members excluded without compensation by the *Deutsche Hopfen-Verkehrs-Gesellschaft* (D. H. V. G.) were now granted a payment of 125 % of their shares. Expenses of arbitration were distributed pro rata. All legal actions against the D. H. V. G. were thereupon withdrawn.

D. H. V. G.

From now on the German Hop Growers Association is in exclusive ownership of the D. H. V. G.

The situation on the German hop market in the beginning of May 1953 induced the D. H. V. G. to call upon hop farmers to deposit remaining unsold stocks with the D. H. V. G. against a part-payment. Final payment would be effected after the complete sale of these hops.

During a meeting of the Hop Growers Association on February 13th, 1953, it was resolved to create an Institute for Hop Research and Instruction in Mainburg. This project is to be financed by a levy of DM 5.— per 50 kilos on all hops crop 1953 sold by farmers.

New Institute for Hop Research

This institute had been created by the initiative of the German brewing industry during the crisis year of 1926. Research is done on the Experimental Hop Farm Hüll/Hallertau. It seems opportune to state that this institute has saved the German hop industry from considerable damage and partial destruction by information about the then practically unknown disease of Downy Mildew.

German Institute for Hop Research

There exists considerable uncertainty about the provisions of this tax. According to a decision of the *Reichsfinanzhof* of 1939 (RFH. 45/245) the hop trade was subject to a turnover tax of then 2 % because cleaning, repicking, kilning, sulphuring and packing in drums in one operation was considered processing the hops. In the meantime, the tax has been increased to 4 % and the prices have increased so that payments per 50 kilos are at least four times higher than in 1939. As most hop warehouses have been destroyed during the war, these manipulations cannot always be done in one operation. Contrary to earlier usage, there is now a tendency by some tax collecting agencies to consider each individual step of manipulation as a separate processing of the hops and to levy the turnover tax several times. This would not only overcharge the German breweries, but damage especially the export of hops.

Turnover Tax

It has not been possible to settle this question in direct contact with the tax collecting agencies and it will be necessary to obtain a legal decision.

The export of hops continued to be subject to export licences. Exports have not been limited during the season 1952/53 although the German brewing industry asked for such a measure. Some few applications could not be approved as prices evidently did not conform to the market situation or in some instances where the *Bank Deutscher Länder* ordered a limited stop of exports to adjust the balance of clearing.

Export Licences

Applications for export licences were more closely inspected in the beginning of November 1952 when it seemed that available quantities of German hops would not be sufficient to fulfil trading agreements. Licences suffered a delay in some instances where contingents had been exceeded. These official measures were eased very soon, however, as it became speedily apparent that exports to many countries were lower than agreed upon so that corresponding quantities became available for exports elsewhere.

Validity of export licences should be increased from three to six months and it would be welcome if formalities for approval of same could be reduced. On the other hand, abolishment of licences for the export of hops is under consideration.

Difficulties in the export of German hops have been on the increase. Several countries have been obliged to limit imports from Germany in order to adjust the balance of trade.

Export difficulties

Payments from Brazil were not credited any more at the official rate of exchange according to a resolution of the *Zentralbankrat* dated September 3rd, 1952. Exporters had to sell their Brazilian exchange to importers in Germany on the free market. This unexpected alteration resulted in losses to exporters and in considerable inquietude as this decision was feared to set a precedence for future surprising liquidations of passive balances of exchange.

Exports from May until September 1952 amounted to 752,210 lbs. so that TOTAL EXPORTS for CROP 1951 amounted to 11,602,810 lbs.

German hop exports crop 1951

German hop exports crop 1952

German hop exports crop 1952 are computed according to details in hand as follows:

Exports of German Hops Crop 1952					
October 1952 — April 1953					
	lb.	lb.		lb.	lb.
Belgium	1,003,093		b. f.	104,278	4,944,256
Denmark	228,397		Uruguay	114,198	
Finland	29,762		USA	2,260,597	
France	937,396		Venezuela	66,138	
Greece	441		AMERICA		2,545,211
Great Britain	27,778		Egypt	11,023	
Iceland	661		Algiers	5,512	
Italy	615,524		Kongo	134,922	
Canary Islands	16,094		French Cameroon	8,598	
Luxembourg	102,734		French Morocco	34,171	
Netherlands	212,523		French West Africa	15,432	
Norway	92,152		South Africa	29,982	
Austria	403,221		South West Africa	2,645	
Portugal	19,401		Tunis	24,251	
Roumania	44,092		AFRICA		266,536
Saar	75,838		Hong Kong	3,968	
Spain	344,138		India	8,377	
Sweden	357,366		Indochina	44,092	
Switzerland	301,369		Indonesia	46,958	
Czechoslovakia	22,046		Iran	4,409	
Hungary	110,230		Japan	1,323	
EUROPE		4,944,256	Libanon	2,205	
Argentina	2,425		Philippine Isl.	20,282	
Brazil	58,863		Thailand	10,362	
Brit. West India	16,535		Turkey	44,092	
French West India	2,205		ASIA		186,068
Chile	12,125		Australia	882	
Columbia	3,307		AUSTRALIA		882
Ecuador	1,543		Total		7,942,953
Guatemala	661				
Peru	6,614				
c. f.	104,278	4,944,256			

German hop imports 1951

Only 39,242 lbs. of hops were imported during the months of May to September 1952. TOTAL IMPORTS CROP 1951 therefore resulted in 274,252 lbs.

Crop 1952

It has been possible to realize the wishes of the German brewing industry to equalize by imports the foreseeable trend of the German hop market in the autumn of 1952. A considerable amount of exchange for the import of American hops was made available by the German authorities at the end of October 1952. In addition, there resulted possibilities of transactions in transit. Imports of hops from October 1952 until April 1953 show the following figures:

Belgium	70,768 lbs.
France	52,249 "
Great Britain	341,493 "
Italy	11,023 "
Jugoslavia	60,847 "
Netherlands	59,965 "
Czechoslovakia	366,404 "
U. S. A.	886,910 "
Total	<u>1,849,659 lbs.</u>

Parts of these hops have been re-exported in unbroken transit.

It is possible to give the following tabulation of the acreage under hops on the farms of abt. 14,000 producers, according to a publication sponsored by the German Hop Growers Association:

**Hop Production
in Germany**

Acreage per Farm	Number of Hop Farms							
	Hallertau	Spalt	Hersbrucker Gebirge	Jura	Tett nang	Wurtemberg	Baden	Rheinpfalz
Up to 0.1 ha *)	102	145	273	12	26	127	163	16
0.11 to 0.2 "	1,066	421	492	86	258	628	63	44
0.21 " 0.3 "	1,097	353	341	101	249	238	19	29
0.31 " 0.4 "	985	237	211	35	180	75	6	8
0.41 " 0.5 "	706	174	167	19	142	36	4	9
0.51 " 0.75 "	1,165	292	219	23	208	15	2	2
0.76 " 1.00 "	737	138	90	7	93	5	1	5
1.01 " 1.50 "	813	95	46	8	63	1	—	—
1.51 " 2.50 "	468	22	11	1	29	—	—	—
2.51 " 5.00 "	171	3	2	—	7	—	—	—
5.01 " 10.00 "	18	—	—	—	3	—	—	—
more than 10.00 "	4	—	—	—	—	—	—	—

*) the smallest allotted acreages are 3 ar = 0.03 ha.

1 ha = 2.471 acres.

Social security statistics show that more than 60,000 hop pickers were employed during crop 1952 in the Hallertau alone, of which two thirds were women. The total number of hop pickers including relatives helping out during the crop may be estimated at more than 80,000.

Hop Picking

The average production of a picker is from 6 to 8 baskets per day. Payment in 1952 was DM —.80/DM 1.— per basket inclusive food, or DM 1.50 per basket exclusive food. One basket in the Hallertau contains 60 liters.

On the average, 33 baskets of green hops are required for 1 Ztr. (110,23 lbs.) of hops dry basis.

It seems scarcely possible to install hop picking machines, either stationary or field units, in Germany as the bulk of the hops is produced on acreages of small and middle size. The expensive machines will not even be economical for the very few farms with bigger acreages under hops.

**Hop Picking
Machines**

The range of gardens as shown in the above table indicates that an unbridled expanse of the acreages is scarcely possible. It has to be borne in mind that mechanical conditions on farms, most especially kiln capacity, limit the potential production. Furthermore, farmers tend to retain a certain balance among hops and other produce.

**Increase of
acreages per farm**

The hop acreage in Germany according to the stand of July 1952 was as follows:

Acreage 1952

District	1939 acreage	1952		
		Existing acreage	Additional acreage	total
Hallertau	11,317 acres	12,083 acres	413 acres	12,496 acres
Spalt	2,276 "	2,045 "	49 "	2,094 "
Hersbruck	2,118 "	1,490 "	39 "	1,529 "
Jura	200 "	214 "	12 "	226 "
Tett nang *)	—	22 "	—	22 "
Aischgrund (1938)	200 "	12 "	1 "	13 "
Other Districts	—	32 "	3 "	35 "
Bavaria	16,111 acres	15,898 acres	517 acres	16,415 acres
Wurtemberg-RHW.	1,223 "	—	—	560 "
Tett nang **)	1,636 "	1,493 "	42 "	1,535 "
Baden	440 "	44 "	5 "	49 "
Pfalz	150 "	69 "	30 "	99 "
Total	19,560 acres	—	—	18,658 acres

*) areas in Bavaria

**) except areas in Bavaria

**Expansion
of Acreage**

The BELF (*Bundesministerium für Ernährung, Landwirtschaft und Forsten*) invited authorities and organisations interested in the hop industry to a discussion on October 2nd, 1952. It was resolved to increase to a total of 22,239 acres the area in Germany which up to then had been limited to not more than 20,756 acres. Areas were distributed among the three *Länder* on a basis which deviates somewhat from the table above:

	Acreage 1952				
	Existing acreage	Additional acreage	Total planted	Allotted	Allotted but not planted
Bavaria	16,051 acres	517 acres	16,568 acres	17,667 acres	1,099 acres
Baden-Württemberg .	2,308 „	91 „	2,399 „	2,990 „	591 „
Rheinland/Pfalz . .	64 „	5 „	69 „	99 „	30 „
Total	18,423 acres	613 acres	19,036 acres	20,756 acres	1,720 acres

Instructions for the allotments were issued by the BELF through resolution Nr. 226 of November 15th, 1952. The acreage has been allotted to the three *Länder* as follows:

Bavaria	18,930 acres
Württemberg-Baden	3,203 „
Rheinland-Pfalz	106 „
Total	<u>22,239 acres</u>

The areas have been distributed among the several districts of production as follows:

	acres	acres		acres	acres
Hallertau	14,332		b. f.		18,930
Spalt	2,471		Tett nang **)	2,011	
Hersbruck	1,779		R. H. W.	1,063	
Jura	272		Nordbaden	129	
Tett nang *)	49		Baden-Württemberg . .		3,203
Aischgrund	27		Baden	—	
Other Districts	—		Pfalz	—	
Bavaria		18,930	Rheinland-Pfalz		106
c. f.		18,930	Total		22,239

*) areas in Bavaria

**) except areas in Bavaria

The acreage in full bearing for crop 1953 may be estimated at about 19,000 acres. Considerable new areas have been planted to hops during the spring of 1953. It has not been possible up to now to tabulate the extent of the new plantings as no official figures are available as yet. The increase is estimated at about 7 - 10 % of the old acreage.

In the Hallertau the acreage already exceeds the area of 1939. A further increase of the plantings in the districts of Tett nang and Spalt seems to be desirable as these hops are much in demand for reason of their aroma. Other districts of production are still far from the acreage of 1939.

**Deutsche
Demokratische
Republik (D.D.R.)**

Supplying hops to the D.D.R. encountered various difficulties. Several shipments from Western Germany, however, became possible after a prolonged interruption. The trade agreement between Western Germany and the D.D.R. dated May 15th, 1952 (*Bundesanzeiger* Nr. 93, May 15th) did not contain provisions for the delivery of hops. Independently of this, a barter deal including about 187,000 lbs. of German hops crop 1951 was realized in the spring of 1952.

Later on, an amount of DM 5,000,000.— became available. Against this, shipments were effected of German hops, crop 1951, as well as some lots of transit hops and about 418,000 lbs. of German hops, crop 1952.

Additional shipments amounting to about DM 3,500,000.— in February/March 1952 and further deliveries contracted for in May/June 1953 have exhausted the amount of DM 4,800,000.— available for hops, according to a later agreement (IZH. resolution 28/53). It has been possible to import additional quantities of hops from Czechoslovakia, England and other countries.

Spring work in the hop yards as well as the development of the hops was retarded by the long winter of 1951/52 and the cold and dry weather following. Cold weather in May 1952, which in some parts resulted in FROST DAMAGES, continued during the first half of June. New gardens suffered especially from this weather. On the average, vines were strung by the middle of May. At this time, too, first sprayings against DOWNY MILDEW were effected. The general stand of the crop at the end of June was retarded as compared to normal growth. Early cut gardens constituted an exception. Warmer weather beginning by the end of June improved growth, but weather during July was too dry to benefit the vegetative development of the crop.

Czechoslovakia

APHIDS were notable only in some districts of Auscha whereas RED SPIDER had to be controlled generally during hot weather.

PICKING began under good weather conditions during the second half of August 1952 and was finished in the first week of September. Work was somewhat hampered by rains during the close of the harvest.

The smaller crop 1952 reduced the balance of hops available for exports. This tended to increase demand for the fine hops of other European origins. An additional quantity of Czechoslovakian hops became available for exports later on as hops from other origins were imported.

Saaz hops crop 1952 had the known fine aroma and were rich in lupulin with especially high bitter values. Cones were of exceptionally small size and good colour.

No data are available from the BACKA district. It is said that the drought, under which all countries in the Danube district have suffered, did considerable damage in the Backa. The hop crop 1952 is indicated as only about 40 % of crop 1951.

Jugoslavia

In SLOVENIA ground moisture was increased by snowfalls during the winter of 1951/52. The warm weather following soon after the thaw resulted in a rapid start of the crop so that spring work had to be accelerated. FLEAS were no danger but VOLES did occasional damage.

The month of May 1952 was dry and from very cool to cold but there were only small damages from FROST. The weather was exceptionally hot and dry by the end of May/beginning of June. Thunderstorms brought cooler weather and welcome rains by mid June as well as occasional damages by HAILS. Early cut gardens reached the height of the poles already by the end of June. The general aspect of the crop, however, remained unequal as the development of later cut gardens was hampered by dry weather. Exceptionally hot and dry weather in July did not benefit the growth of the crop. Thunderstorms during the second half of this month brought welcome precipitations. Considerable DAMAGES from HAIL were to be noted at this time in some districts of Slovenia.

DOWNY MILDEW was no danger in 1952 but RED SPIDER had to be controlled by repeated sprayings. Total precipitations during 1952 were 1086,7 mm of which only 272,3 mm from March through July. PICKING began on August 15th and was finished during the first days of September under favourable weather conditions. The quality of the crop was estimated as 92 % prime, 6 % middling and only 2 % offgrade. Styrian hops crop 1952 were of excellent quality and uniform green colour, very rich in lupulin and of fine aroma. It may be noted that hops were shipped in very good dry condition.

The total crop of Styrian hops is being handled on a cooperative basis. Prices to farmers are regulated according to cost of production while sales are made on the basis of world market quotations. Sales to the U.S.A. are preferred in order to bridge the Dollar-gap.

About 95 % of all gardens are provided with poles. These are preferred to trellises as hop yards have to be relocated every ten years by reason of the prevailing sandy soils.

Belgium

Development of the hops was retarded by general dryness until the end of July after a normal start of the crop in the spring of 1952. Precipitations amounted to 757,2 mm in POPERINGHE from January to December 1952, but only 112,9 mm fell from April until July 1952. Growth of the Fuggles variety especially was insufficient with short laterals. The development of hops was satisfactory in ALOST, where Fuggles are scarcely planted.

BLOOM was plentiful. Welcome rains by the end of July and during August have benefitted the development of the bloom and the FORMATION OF THE CONES. The sizing of the cones, however, was not satisfactory on the Fuggles. It is supposed that the destruction of all male plants resulted in the smaller size of the cones. About 45 % of all hops grown in Poperinghe are of the Fuggles variety, the yield of which attained scarcely half of that of the preceding year.

PICKING of earliest varieties began in Alost about August 26th/September 1st and was in full swing by September 8 th. There were sufficient pickers available and the harvest was generally finished on September 18th. The weather during harvest was favourable.

The quality of Belgian hops crop 1952 shows a notable improvement against 1951. Most remarkable are clean picking and considerably less SEEDS. One third of the crop is considered of prime quality and well over half of the crop as middling. Only 6 % of the total crop are considered as offgrade.

ACREAGE is scarcely reduced in Poperinghe and somewhat higher in Alost. The crop in Alost exceeded that of the preceding year by more than 110,000 lbs. whereas in Poperinghe there were about 770,000 lbs. less harvested than in 1951.

Prices began in Alost on the basis of bfrs. 4,500/4,800.— and rose until bfrs. 5,500/5,700.—. Prices for other qualities followed this trend. First prices in Poperinghe were bfrs. 3,500.— for Fuggles varieties and bfrs. 3,750.— for Replant Hallertau. It was scarcely possible to purchase at these prices which began to rise immediately. By the middle of September, Fuggles were sold at bfrs. 4,500.—/5,000.— and Replant Hallertau at bfrs. 5,000.—/5,500.—.

The district of Alost was sold out completely by the end of October, whereas in Poperinghe there were still about 40 % of the crop in farmers' hands at this time.

IMPORTS OF HOPS into Belgium crop 1951 from September 1951 to August 1952 amounted to a total of 3,168,010 lbs.

IMPORTS OF CROP 1952 from September 1952 to March 1953 were as follows:

	lbs.		lbs.
England	308,644	b. f.	1,770,294
Western Germany	1,097,891	U. S. A.	438,715
France and Saar	24,251	Czechoslovakia	645,948
Jugoslavia	339,508	Netherlands	30,864
c. f.	1,770,294	Total	2,885,821

Belgian HOP EXPORTS crop 1951 totalled 967,819 lbs.

EXPORTS OF CROP 1952 from September 1952 until March 1953 were as follows:

	lbs.		lbs.
Western Germany	205,028	b. f.	615,084
Austria	271,166	Union of South Africa	17,637
Brazil	2,205	Czechoslovakia	194,005
Denmark	35,274	Roumania	66,138
U. S. A.	44,092	Tanger	2,204
Netherlands	30,864	Kongo	2,204
Switzerland	26,455	Total	897,272
c. f.	615,084		

France

In line with conditions in other European districts of production the weather in the ALSACE, too, was not favourable for the growth of the hops in 1952. Precipitation was lower than the year before while hot and dry weather retarded the growth of the plants. Development of laterals did not come up to expectations. Bloom was unequal and the FORMATION OF THE CONES began only after August 15th. Ripening was not uniform.

During the dry weather there was no danger from DOWNY MILDEW whereas repeated sprayings were necessary against RED SPIDER. PICKING began as usual on the first Monday in September 1952 and was finished about September 25th under partially rainy weather.

The quality of crop 1952 was indicated as 67 % prime, 25 % middling and only 8 % offgrade. The crop was somewhat smaller than the year before. About 75 % of the Alsace hops were purchased by the hop growers' co-operative and 25 % by the trade. On the average, growth of the cones was uniform, lupulin was amply present, of good quality and the aroma was satisfactory.

The hops suffered from dryness in the district of FLANDERS as well, especially during the months of May and June. The general development of the hops was retarded about a fortnight as against normal growth. The first FORMATION OF THE CONES was to be noted about the end of July 1952. The HARVEST began at the end of August and was finished by the middle of September. There were sufficient pickers available and the hops could be gathered in under favourable weather.

Quality is estimated as 60 — 65 % prime, 20 — 25 % middling and 10 % offgrade. Extermination of the male plants during 1952 has resulted in better qualities through the reduction of seed content. In quantity, crop 1952 was only about half of crop 1951. Quotations set in on the basis of ffrs. 20,000.— and jumped to ffrs. 25,000.— within 24 hours. Further increases following the higher prices on the German hop market contributed to the top quotation of ffrs. 35,000.— per 50 kilos. The crop was sold out by the end of January with the exception of about 50,000 lbs.

The experimental hop gardens in the Mühlviertel may be increased to a total of 25 acres in 1953. For the time being, experiments are going on with hop plants from Jugoslavia, Germany and England. Some encouraging results have been noted. There are about 7.5 acres experimental hop gardens in Southern Styria where good qualities have been obtained so that increases of the hop yards are intended. Further experimental yards are to be found near Vienna and in upper Austria.

Austria

Custom duties on hops have been decreed on the 30th of December 1952 at the rate of Goldschilling 60 = Austrian Shillings 375.— per 100 kilos. The total hop demand of the brewing industry in Austria is estimated at about 1,750,000 lbs. per year.

The hops reached the height of the trellises on June 23rd, 1952, and showed a luxuriant overhang. Yards in well favoured locations showed ripened cones even on the lower third of the vines, while in yards on dry soils only the top third was well developed. Precipitations from January until August 1952 amounted to 538 mm. Picking began on August 15th and was finished under favourable weather on September 4th. The crop amounted to 15,342 lbs. on an area of 15.5 acres. The colour of the hops was good and lupulin was amply present. Bitter values were high. More than 80 % of the hops were paid for on the basis of sfrs. 660.— per 50 kilos for first quality, while somewhat less than 20 % of the crop obtained sfrs. 600.— as second quality.

Switzerland

It is intended to slowly increase the acreage. Funds have been assembled to regulate prices in years of low quotations on the hops world market.

Cold weather during May and June 1952 retarded growth. The sunny spell during the first half of July was very welcome, but the weather turned rainy until harvest time. The hops suffered from DOWNY MILDEW, APHIDS and RED SPIDER. Sprayings against Downy Mildew were effected on the average once in a fortnight.

Sweden

PICKING set in during the first days of September and went on during the whole month under changing weather conditions. On the acreage of about 22 acres a crop of 12,125 lbs. was brought in (against 17,637 lbs. in 1951) which were shipped to sponsoring breweries. Replant Saaz were worse than the year before, while the Swedish Hybrid Svalöf 85 showed a quite good development and only colour was not quite satisfactory. The quality of the hops was estimated at 93 % prime and only 7 % offgrade.

Hop production in Spain is on the upswing so that a constantly greater portion of the demand in Spain can be covered. In 1952 there were harvested about 292,000 lbs. although a drought in the district of León reduced the result. Even so, the total crop was about 2.5 times that of crop 1951. The hops are, however, not seedless.

Spain

The number of plants cultivated in the different districts of production is indicated as follows:

Galicía	abt. 559,000 plants
León	„ 163,000 „
Asturias	„ 42,000 „
Vasco-Navarra	„ 54,000 „
Total	<u>abt. 818,000 plants</u>

Additional increases of acreages are planned. Existing kilns are being improved and new kilns are under construction. There are difficulties in pressing the hops as necessary installations are lacking.

A humid late winter was followed in 1952 by a dry spring and a hot dry summer. The hops suffered from lack of rain until July. At picking time there were fully developed hops on the vines as well as fresh burrs as secondary growth after rainfalls in August. Golding hops, which prefer dry weather showed a good growth whereas gardens on the heavy clay soils in the Weald of Kent suffered under the dryness. Precipitations from January until September 1952 amounted to 16.16 inches.

The plants reached the height of the trellises at the beginning of July and showed a good overhang. PICKING began in Kent about August 27th and was finished about September 26th. Start and close of the harvest were about ten days later in the Midlands.

There were sufficient pickers available in Kent whereas in the Midlands there was a scarcity of labour, which could be compensated in part by machine picking. Weather during the harvest was good on the average, although more humid than common. The harvest, however, was hampered by rain only during a few days. About two thirds of the crop were of prime quality, the balance of middling quality with small quantities offgrade. The colour of the English hops was greener than in 1951 and the quality more uniform and somewhat better. Contents of lupulin were not too high and bitter values were low.

The average price to producers was fixed by the Hop Marketing Board at £ 23.3.— per cwt. which is an increase of £ 2.— over 1951.

The following demands have been registered for crop 1953:

Home Consumption: 222,109½ cwts. (against 234,500 in 1952)

Exports: 15,366½ cwts. (against 23,670 in 1952).

Exports of English Hops Crop 1952			
September 1952 — April 1953			
	cwts.		cwts.
Egypt	111	b. f.	51,853
Australia	11,294	Kenya	185
Belgium	3,581	Madeira	36
Brit. Honduras	1	Federation of Malaya	11
Burma	27	Malta and Gozo	352
Canada	1,523	New Zealand	13
Ceylon	181	Netherlands	1,154
Denmark	533	Nigeria	52
Germany (East and West)	6,027	Northern Rhodesia	289
Falkland-Islands	1	Pacific Islands	3
Fiji-Islands	9	Singapore	1,115
Finland	615	Sudan	12
Gold Coast	113	Union of South Africa	1,312
Hong Kong	90	Southern Rhodesia	680
India	124	Sweden	387
Iraq	43	Switzerland	54
Eire	27,179	Trinidad	30
Jamaica	8	Czechoslovakia	6,766
Channel Islands	393	Uganda	5
c. f.	51,853	U. S. A.	94
1 cwt. = 50.8 kilos		Total	64,403

While the marketing agreement in the U. S. A. has now been terminated, the English hop market continues to be controlled by a well functioning market regulation which has been in force these last 20 years. The top organisation is the Permanent Joint Hops Committee comprising representatives of producers and consumers deliberating together with neutral members, nominated by the Ministry of Agriculture. The most important task of this gremium is the yearly settling of the hop price as well as of the quota of production. There have been obtained reliable data over the past years as a basis for the prices. Questionnaires about the cost of production are sent out yearly to about one third of the total of 1,000 hop farmers. Expenses per unit of acreage are divided by average yield per unit of acreage and this results in the average price for average qualities.

The quantities of hops required both for home consumption and exports must be registered in February of each year. These hops must be taken over regardless of the price. A quota of production is set for farmers on the basis of contracts registered. A discount on contracts will be allowed if the harvest is smaller than expected.

There is no obligation to take more hops than contracted for if the harvest should exceed demand. Hops are distributed through a limited group of brokers and dealers.

There is only a small import of hops into Great Britain which is limited at 1,000 cwts. per year for the production of special types of beer only.

In CALIFORNIA growth was very good during 1952 in the district of SACRAMENTO.

U. S. A.

During the season from July 1st, 1951, until June 30, 1952, there occurred exceptionally heavy rainfalls totalling 26.59" as against an average of 17" per season. Rain is not of special importance for the cultivation of hops as hop yards can be artificially irrigated.

In the district of SACRAMENTO, the only pest is the RED SPIDER against which two sprayings within ten days are generally sufficient. DOWNY MILDEW was only sporadically apparent in 1952. This disease constitutes a danger only if heavy rainfalls in June coincide with high temperatures.

PICKING began sporadically about August 8th, 1952, and was in full swing a week later. The harvest was generally finished by the beginning of September. Picking is almost exclusively done by picking machines, mostly of the stationary type.

Development of the crop was good until the end of June in the districts of SONOMA and MENDOCINO. In Sonoma, exceptionally heavy rains in June were followed in July by a heavy attack of DOWNY MILDEW. Gardens were damaged and plants could not well recuperate after the disease had been controlled. Downy Mildew was insignificant in Mendocino.

Precipitations amounted to only 3.4" during the season (July 1st, 1951/June 30th, 1952). The production of hops does not depend upon rainfall, as 95 % of the gardens are irrigated and there is sufficient water available.

HARVEST started in Sonoma about August 23rd/25th and in Mendocino about August 17th/20th. There were not sufficient pickers available to harvest the crop on not mechanised farms. Gardens on these farms were partly left unpicked and sometimes picking was done by contractors.

About 70 % of the crop are estimated as prime quality, 20 % as middling and 10 % as offgrade.

OREGON. Light FROSTS did only negligible damage to the plants during the start of the development. For the rest, weather conditions were favourable in Oregon. Precipitations from January until December 1952 amounted to 18.7". DOWNY MILDEW was no danger during the dry growth in 1952 so that no more than three or four sprayings were effected.

The harvest of Fuggles varieties started about August 10th, whereas Clusters were picked about a fortnight later. The harvest was finished by the middle of September. The bulk of the crop in Oregon is being picked by machines. Labour was scarce on farms where picking had to be done by hand. The weather was very favourable during the harvest. The crop is estimated as abt. 65 % prime quality, 25 % middling and 10 % offgrade.

WASHINGTON. In the district of YAKIMA, the crop was damaged by a severe FROST so that healthy vines had to be re-strung. STORMS as well as a CLOUDBURST by the end of July occasioned considerable damages on laterals, cones and bloom. A number of trellises was overturned.

Precipitations in Yakima are very small. There is no DOWNY MILDEW in Washington. PICKING began about August 20th and was finished by the end of September. About 98 % of the hops are machine-picked. Qualities are estimated at about 75 % prime, 20 % middling and 5 % offgrade. About 20/25 % of the crop remained unpicked because the hops did not come up to the normal standard of quality.

A quantity of only 39,200,000 lbs. was released for sale out of a total crop 1952 of abt. 61,263,000 lbs. The quantity of unsaleable hops, therefore, amounted to about 36 %.

Marketing
Agreement
U. S. A.

Quotations could not develop according to expectations under the marketing agreement, although farmers had to sacrifice about one third of their crops. Prices stood sometimes under cost of production. During the months October/November 1952 there was a certain activity in the market and at that time purchases from German importers were effected.

The price situation as well as other complaints against the marketing agreement among which the so-called "diversion privileges" resulted in a vote against the marketing agreement in a referendum of the about 1,000 producers of hops. The marketing agreement, therefore, has been discontinued as of June 30th, 1952.

It will be necessary to closely observe the effect of this development upon the world market. There are considerable unsold stocks of crop 1952 as well as of former crops available. On the other hand, reports received indicate that extensive acreages are being left idle in Washington, Oregon and California. It has not been possible as yet to estimate the effect of these measures, and most especially it is not clear whether the acreage left idle has been plowed out or whether the gardens affected may come into production again in more auspicious years.

**Hop Imports
U. S. A.**

Total imports of hops into the U. S. A. from September 1st, 1952, until August 31st amounted to 3,738,340 lbs. of crop 1951.

During the period September 1st, 1952, until February 28th, 1953, the following quantities of hops crop 1952 have been imported:

Belgium/Luxembourg	30,846 lbs.
Canada	565 "
Germany	872,399 "
Great Britain	100,969 "
Jugoslavia	691,353 "
Total	<u>1,696,132 lbs.</u>

**Exports of hops
U. S. A.**

Exports of hops crop 1951 from the U. S. A. during the year October 1951 to September 1952 amounted to 12,054,202 lbs.

Exports of crop 1952 are shown as follows for the months October 1951 until February 1953:

Exports of U.S.-Hops Crop 1952			
October 1952 — February 1953			
	lbs.		lbs.
Belgium-Luxembourg	475,422	b. f.	6,348,807
Kongo	36,927	Great Britain	3,306
Bermuda	882	Guatemala	1,433
Bolivia	29,431	Honduras	35,274
Brazil	767,972	Irish Republic	29,542
Brit. Malaya	1,543	Iceland	992
Canada	1,429,573	Mexico	1,964,188
Ceylon	11,464	Mozambique	11,243
Chile	333,776	Nicaragua	4,299
Columbia	879,636	Netherlands	267,418
Costa Rica	8,047	Norway	63,713
Cuba	234,239	Palestine	44,312
Denmark	199,406	Panama	40,565
Germany	1,471,681	Peru	139,662
Ecuador	77,051	Portugal	52,690
Finland	10,913	Salvador	55,005
Formosa	37,368	Union of South Africa	53,351
France	319,446	Sweden	36,486
French Pacific Islands	1,984	Switzerland	319,778
Greece	22,046	Venezuela	297,180
c. f.	<u>6,348,807</u>	Total	<u>9,769,244</u>

Canada

The center of hop cultivation in Canada has shifted during the postwar years insofar as acreages in Quebec and Ontario decreased constantly while the hop gardens in British Columbia developed into the most important center of production. Hop yards there are situated under water level along the lower Fraser valley, so that subsoil moisture is high. The cultivation consists mostly of Fuggles variety.

Experimental hop plantings are going on in Kamloops, about 150 miles to the north of the Fraser valley, and in Alberta.

Japan

Hops had a good growing season in 1952 and the crop was gathered in under favourable weather conditions. The result of crop 1952 has shown that the brewing industry in Japan is now able to cover its demand out of the home production. An increase of the present acreage is not intended. A certain percentage of the gardens, however, had not yet come into full productivity in 1952 and an increase of production may be expected for the coming crops of 1953 and 1954, given years of normal growth. Output of beer in Japan is on the upswing since 1951. A continued good development of beer consumption is being expected as it has been able to obtain a reduction of 23 % in the excise tax on beer.

Hops are under cultivation in the districts of SIERRA DE LA VENTANA (30 acres), MAR DEL PLATA (101 acres) and in the valley of the RIO NEGRO (124 acres). There are no pests and diseases. The hops have to develop, however, under occasionally extreme weather conditions so that yields are correspondingly low. It appears that hop gardens develop best in the valley in the Rio Negro, where there are ample possibilities for artificial irrigation. It is intended to expand the acreages, although as yet the gardens may not have outgrown a more or less experimental stage. HARVEST was finished by the end of February 1953. The development of the hops was favourable in the Rio Negro valley while in Sierra de la Ventana the development was hampered by NIGHTFROSTS and STORMS with occasional HAILS as well as dry weather.

HALLERTAU. The first CUTTING of the hops could be finished relatively early under good weather conditions. Hop gardens had received a careful fertilization and showed a healthy first growth. Missing hills as a consequence of damages by GRUBWORMS were replanted. Humid weather during April and warm temperatures during the first half of May resulted in such a luxuriant growth that it was scarcely possible to follow the development with the necessary cultivating work. Some NIGHTFROSTS after May 10th did only slight damage. Extremely strong invasions of MAYBUGS necessitated controlling this pest on an overall scale.

Growth 1953
in Germany

Hot summer weather during the second half of May furthered growth. There were practically NO PESTS or DISEASES, but preventive sprayings were effected where it seemed indicated. The plants reached the height of the trellises on the average until the end of June, although rainy and sometimes cool weather since the beginning of that month retarded growth. The general aspect of the crop is healthy and there are numerous laterals present. Pests and diseases continue negligible.

SPALT. Spring work and fertilization could be effected well in time and under good weather conditions. The UNCOVERING of the hops was effected generally after Easter and finished by the end of April. PESTS were practically absent and controlled as far as apparent. FLEAS were favoured by cold nights but were no danger. Retarded gardens benefitted by warmer weather in May. Farmers generally had a difficult time working the hops as growth was so rapid.

TETTANANG. The UNCOVERING of the hops during March went on under dry weather. There were welcome precipitations in April. Hop yards generally received a liberal basic fertilization. Development was good under favourable weather in the first half of May. Preventive sprayings against pests and diseases were effected as far as necessary. The control of GRUBWORMS occasioned much work as these pests are now in the third year of growth. Some FROST until -8°C did no great damage, whereas later on there were some damages from HAIL.

RED SPIDER had to be controlled during the warm weather in May. The development of the hops benefitted by precipitations and sultry weather during May and June. The hops reached the height of the trellises about June 20th. The aspect of the hop yards is healthy and there are numerous laterals.

HERSBRUCKER GEBIRGE. The gardens have come well through the winter and were cut during the second half of March under dry and warm weather conditions. Stringing of the hops was finished by the end of April. The young vines were healthy and strong. Preventive sprayings against Downy Mildew were effected. Growth was somewhat retarded during a cold spell, but this was offset by good development under warm weather in May. Sporadically there was some danger from RED SPIDER. Growth was almost too vigorous in June. New plantings of hops showed an excellent development.

WURTTENBERG. There were abundant snowfalls during the winter of 1952/53. Spring work was finished in March under dry weather. New plantings had to receive manual irrigation at that time. Generally the gardens came well through the winter. Growth was favourable during April and retarded by cold weather during the first half of May. The following warmer weather resulted in thunderstorms and HAILS which did considerable damage in some parts. The general aspect of the crop in June was satisfactory and healthy and there were practically no pests and diseases.

At the present time, the general stand of the hop yards in Germany conveys a very favourable impression.

JOH. BARTH & SOHN

