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Hop Report 1954/55

Extended full employment of available labour indicates the favourable situation of industrial countries which accelerated the recuperation of hitherto less favoured economies. A decreasing coffee market adversely influenced the economical situation in some countries of South- and Central-America.

**Economical
Situation**

The foreign trade of Western Germany continued to expand. Reserves both of gold and foreign exchange held by the *Bank Deutscher Laender* augmented in volume so that a free convertibility of the D-Mark may become possible in the near future. Employment was up to 96 % for the first time since the war. Increased availability of domestic funds helped to cover the constant need for additional capital.

An Increased Production of beer during 1954 as compared with 1953 is shown in the following countries: Argentine 4 %, Australia 3.4 %, Belgium 1.5 %, Belgian Congo 2.8 %, Bolivia 5.7 %, Chile 2.6 %, Columbia 8.3 %, Cuba 1.2 %, Denmark 0.9 %, Germany 5.4 %, Ecuador 9.4 %, France 4.6 %, Greece 14.3 %, Indonesia 13.6 %, Italy 5.4 %, Japan 2 %, Jugoslavia 41 %, Luxembourg 1.6 %, Morocco 6.7 %, Mexico 15.8 %, Moçambique 2.2 %, New Zealand 4.3 %, Netherlands 8.2 %, Nigeria 9 %, Peru 10 %, Philippines 6.6 %, Poland 10 %, Saar 9.5 %, Sweden 3.7 %, Switzerland 1.4 %, Singapore 6.7 %, Spain 8.3 %, South West Africa 2.5 %, Czechoslovakia 8.3 %, Turkey 11.8 %, Venezuela 3.3 %.

**Production
of Beer**

A Lower Production in 1954 as against 1953 is to be noted in: Brazil 4 %, Canada 3.2 %, Costa-Rica 9.1 %, England 4.6 %, Finland 2 %, Austria 1.3 %, Panama 6.1, Paraguay 1.7 %, Union of South Africa 8.1 %, U.S.A. 3.4 %.

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.) = 3.7853 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.
1 bushel (bu) = 48 lbs. = 21.77 kg (barley malt)	1 Ztr. = 2.2965 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.—.—	
1 mm precipitations = 1 Ltr. of water per m ² , 1 mm = 0.04", 1" = 25 mm.	

Production of beer 1954

Country	1000 bbl. of 31 gall. each	Country	1000 bbl. of 31 gall. each
U.S.A.	88,934	Ecuador	298
England	33,216	Morocco	273
Germany West 26,509		Bolivia	251
East *) 5,114		Indonesia	213
USSR. *)	31,623	Turkey	210
Czechoslovakia *)	14,488	Singapore	190
Belgium	11,079	Greece *)	176
France	10,712	Kenya	152
Australia	8,916	Panama	132
Canada	8,286	Portugal *)	114
Brazil	7,915	Nigeria	93
Mexico	7,915	French West Africa	85
Poland *)	6,136	Tunis *)	77
Columbia	6,136	Egypt	72
Austria	5,583	Formosa	59
Japan	4,687	Paraguay	50
Argentina	4,687	Hong-Kong	47
Denmark	4,293	Iran	45
Ireland *)	3,544	Ethiopia	43
Sweden *)	3,392	Cameroons	43
Switzerland	3,068	Iraq *)	41
Netherlands	2,945	Moçambique	39
New Zealand	2,612	Gold Coast *)	38
Italy	2,439	Dominican Republic	37
Venezuela	2,439	South West Africa	35
Spain	2,041	Costa Rica	34
Cuba	1,689	Ivory Coast	34
Chile	1,591	Angola	27
Peru	1,591	Thailand	25
Finland	1,351	Ceylon	23
Union of South Africa	1,351	French Equatorial Africa	21
Saar	1,183	Tanganyika	20
Jugoslavia	1,183	Libanon	19
Belgian Congo	1,108	Uganda	17
Norway	1,024	India *)	14
Uruguay	943	Iceland	13
Philippines	937	Pakistan	12
Indochina	937	Martinique	10
Luxembourg	914	Madagascar	7
Algiers	801		
	699		
	683		
	648		
	587		
	490		
	454		
	383		
	314		
	307		

*) estimate

Beer Output in Western Germany.

Output of beer in Western Germany during the calendar year 1954 amounted to	25,662,023 bbls.
Production of beer in the Western sector of Berlin for the same period was	849,815 bbls.
Total	<u>26,511,838 bbls.</u>

These figures include 339,890 bbls. delivered taxfree to the occupation forces (1953 = 372,459 bbls.) as well as exports and other sales against foreign currency totalling 496,462 bbls. (1953 = 450,680 bbls.).

Crop 1953 (Supplement)

Imports and exports of hops crop 1953 for various countries during the period September 1st, 1953, to August 31st, 1954, can now be stated as follows:

	Import	Export
Germany	307,101 lbs.	15,993,932 lbs.
Belgium	2,959,455 "	527,120 "
England	440,920 " *)	6,440,518 "
U.S.A.	6,228,215 "	11,381,247 "

*) estimate

The low price level for **German Hops** crop 1953 stimulated additional purchases even after the season of 1953/54 had somewhat advanced. It has been possible to dispose of all stocks with the exception of small quantities only. In **France**, however, there resulted difficulties for the final sale of crop 1953 so that several thousand hundredweights remained in the hands of the co-operative and became yearlings.

Considerable inventories of hops carried over into the crop year 1954 reduced sales' possibilities for hops of the new crop.

Crop 1954

In the spring of 1954, soil moisture was inadequate as precipitations were only moderate during the winter. The **Uncovering** and **Cutting** was hampered by cold and inclement weather during March and April with occasional **Snowfalls**. **Rootrot** was sometimes apparent, but all missing hills were immediately replanted. Spring work was finished almost everywhere by the end of April.

Growth of the Hop Crop 1954 in Germany

The late start of the plants resulted in a harvest which was retarded about a fortnight as against normal years. Vegetative development of the hops was satisfactory during May and June 1954 although the weather was changeable. **Aphids** and **Red Spider** had to be controlled and the usual preventive sprayings against **Downy Mildew** were effected.

Excessive rainfalls in July resulted occasionally in **Floods** which, however, did not damage hop yards. The resulting lower temperatures on the other hand retarded growth and **High Winds** occasioned regional damages. Humid and warm weather by the end of July and during August benefitted **Bloom** and the **Formation of the Cones** and increased crop prospects. **Picking** was generally 10 to 14 days later than normal. The harvest went on under warm and sunny weather in practically all districts. High temperatures together with wet gardens, however, furthered the possibility of **Discolourations** of the hops during picking. The content of lupulin was satisfactory. The wet growth of the hops resulted in a marked decrease of resistance against spoilage during storage.

Weather data from the Experimental Hop Farm Hüll/Hallertau							
1954	March	April	May	June	July	August	Sept.
Precipitations per month (mm)	39	78	89	73	272	84	106
Monthly average of air temperature °Celsius	4.3	5.4	10.8	15.8	14.7	15.4	13.6
Maxima of air temperature °Celsius	17.5	16.5	24.7	29.8	26.7	30.0	27.6
Minima of air temperature °Celsius	-5.1	-4.3	+0.6	+4.3	+4.5	+5.5	-0.3
Monthly average of relative air humidity %	80	78	76	79	79	81	80
Other data:							
Snowfall	6 days	6 days	—	—	—	—	—
Hoarfrost	17 days	6 days	2 days	—	—	—	1 day
Thunderstorm	—	—	2 days	4 days	1 day	4 days	5 days
Storm	—	1 day	—	—	—	—	—

Hallertau. As a consequence of the cold and unfriendly weather **Uncovering** and **Cutting** was finished only during the second half of April. **Rootrot** was regionally apparent. Young shoots developed well especially in early cut gardens.

The development of the plant benefitted by irregular and sometimes warm and sunny weather during May and June. There was only little **Downy Mildew** and attacks of **Aphids** were limited. The appearance of **Red Spider** was hampered by weather conditions.

Acreage, Yield and Production 1953 and 1954

	Acreage 1953 Acres	Yield Pounds per acre	Production 1953 Pounds	Acreage 1954 Acres	Yield Pounds per acre	Production 1954 Pounds
Hallertau	13,919	2,013	28,013,632	13,220	1,738	22,979,869
Spalt	2,256	1,767	3,985,476	2,214	1,369	3,031,986
Hersbruck	1,846	1,536	2,836,438	1,611	956	1,540,905
Jura	356	1,290	459,328	326	1,417	461,974
Bavaria	18,377	1,921	35,294,874	17,371	1,613	28,014,734
Tettngang	1,786	1,669	2,981,832	1,774	1,440	2,555,462
R.H.W.	675	1,254	846,566	576	1,119	644,845
Baden	96	1,551	148,921	86	1,461	125,662
Rheinpfalz	74	1,705	126,213	74	1,257	93,034
Germany	21,008	1,875	39,398,406	19,881	1,581	31,433,737**)
Saaz (Zatec)				17,790	434	7,714,116
Auscha (Ustek)				4,450	743	3,306,018
Other Districts				—	—	—
Czechoslovakia	22,239	515	11,463,920	22,240	495	11,020,134
Alsace	2,545	1,862	4,739,890	2,496	1,310	3,269,422
Dep. Côte d'Or	581	379	220,460	420	394	165,345
Northern France	432	2,041	881,840	568	1,153	654,766
Lorraine	74	745	55,115	49	900	44,092
France	3,632	1,624	5,897,305	3,533	1,170	4,133,625
Alost	581	1,694	984,354	581	1,328	771,610
Poperinghe	1,248	1,650	2,059,647	1,223	1,172	1,432,990
Vodelée	17	1,426	24,251	22	1,102	24,251
Belgium	1,846	1,662	3,068,252	1,826	1,221	2,228,851
Slovenia	3,958	934	3,696,673	3,959	988	3,913,165
Backa	445	1,179	524,695	939	758	712,086
Jugoslavia	4,403	959	4,221,368	4,898	944	4,625,251
Denmark						
Austria	40	882	35,274 *)	59	596	35,163
Galicia				314	913	286,598
León				383	455	174,163
Asturias				77	432	33,289
Vasco Navarra / Santander				32	341	10,914
Spain	741	495	366,515	806	6.6	504,964
Sweden	22	927	20,393	22	366	8,047
Switzerland	20	1,460	29,211	17	1,543	26,235
Poland	1,483	803	1,190,484	4,324	644	2,783,307
USSR.	6,178	892	5,511,500 *	7,413	892	6,613,800 *)
Continent	61,612	1,156	71,202,628	65,019	975	63,413,114
Kent	12,236	1,464	17,920,422	11,589	1,410	16,337,629
Hants	671	1,336	896,280	583	1,067	622,028
Surrey	121	1,232	149,031	116	1,292	149,913
Sussex	2,143	1,338	2,868,074	2,019	1,247	2,517,323
Hereford	4,608	1,285	5,921,115	4,405	1,202	5,297,433
Worcester	2,101	1,281	2,691,486	1,994	1,279	2,550,391
Other Counties	52	1,581	82,231	50	1,514	75,728
England	21,932	1,392	30,528,639	20,756	1,327	27,550,445
Europe	83,544	1,218	101,731,267	85,775	1,060	90,963,559
Washington	13,509	1,634	22,072,000	13,900	1,660	23,074,000
Oregon	7,095	968	6,868,000	5,700	1,210	6,897,000
California	6,272	1,532	9,608,000	6,300	1,600	10,080,000
Idaho	1,493	2,180	3,255,000	1,600	2,150	3,440,000
U.S.A.	28,369	1,473	41,803,000	27,500	1,581	43,491,000
Quebec	50	262	13,104	50	448	22,400
Ontario	934	176	1,646,400	1,030	1,574	1,621,760
Brit. Columbia						
Canada	984	1,686	1,659,504	1,080	1,522	1,644,160
Tasmania	1,296	2,249	2,914,240	1,349	1,647	2,221,465
Victoria	275	1,996	548,800	420	1,306	548,725
Australia	1,571	2,204	3,463,040	1,769	1,566	2,770,190
New Zealand	720	1,431	1,030,400	701	1,392	975,520
Japan	1,878	823	1,545,600	2,000	847	1,693,133
Manchuria	247	669	165,345 *)	247	669	165,345
Argentine	319	525	167,550	319	554	176,809
South-Africa	321	1,183	379,853	284	617	175,265
Total	117,953	1,288	151,945,559	119,675	1,187	142,054,981

*) estimate

**) Official Weighings on March 1st, 1955

Growth of the plants was not satisfactory during the second half of June as the weather was unstable. Control of aphids had to be continued. The general stand of the hop gardens by the end of June was good although somewhat irregular. Moisture at this time was already excessive, and dryness as well as warm weather was very necessary for the further development of the hops. The plants generally had attained three quarters of the height of the trellises and **Laterals** were well developed.

Continued rainfalls which became abnormally excessive during July 1954 were not good for the hops. Warmer weather arrived only by the end of July and benefitted growth of the plants as well as the beginning **Bloom**. Sultry and warmer weather during August resulted in an especially good growth of laterals. Humidity and warmth benefitted the **Formation of the Cones**. **Picking** began about September 1st and was finished about September 18th under good weather conditions.

Quality. Hallertau hops crop 1954 were of green and uniform colour and picking was cleaner than in 1953. Cones were generally smaller in size, but content of lupulin was equal to the year before. Cones with off-colour tips were more plentiful than in former years. As a consequence of the wet growth the sprigs of the cones were rather moist which hampered the kilning of the hops.

Spalt. Hops had wintered well, but showed regionally a somewhat weak growth which improved under warmer weather in May 1954. **Fleas** appeared occasionally in gardens on heavy soils. The stand of the yards was somewhat irregular in June 1954, but hops had attained half of the height of the trellises already at that time. **Aphids** appeared somewhat stronger and had to be controlled. The plants were overhanging the trellises at the beginning of July and laterals were better developed, although the general stand was somewhat retarded. Strong rainfalls during July resulted in cooler temperatures. Warm and sunshiny weather was very necessary for the beginning **Bloom** which developed hesitantly. High winds did some damage at the end of July. Excessive rains had not been appreciably detrimental to the hop gardens but the warm and sunshiny weather beginning in August was especially welcome and benefitted the beginning **Formation of the Cones**. **Picking** began sporadically on August 26th, was general on August 30th and went on under good weather.

Quality. Spalt hops crop 1954 were of a darker green colour than the year before and picking sometimes showed the lack of labour. The content of lupulin and the aroma were good. Spalt hops were especially humid in 1954.

Tettwang. Spring weather in this district was cool to cold and too dry in March. Plants had wintered well, but had only a slow start as the cold weather continued until the beginning of May. Warmer weather in May improved development but this month, too, was still cool and rainy. Regional **Cloudbursts** and **Hail** did some damage. A real improvement in the development of the hops became notable only under hot summer weather by the end of June 1954. At this time plants had reached three quarters of the height of the trellises and laterals were well developed. This satisfactory growth continued until the first half of July when abnormally high rainfalls retarded the development. In some parts the plants appeared slender and pointed. Hops were in full **Bloom** at the beginning of August and the **Formation of the Cones** was beginning in early locations. The hops continued to develop well in August in spite of changing weather. The overhang was not so luxuriant as the year before but cones ripened well. There were some **Storm Damages** locally. **Picking** began generally about the end of August.

Quality. Cones were irregular in size and the colour of Tettwang hops crop 1954 reflected the influences of the inconstant weather. **Picking** was not always as clean as desirable. Lupulin, however, was amply present, of light colour and fine aroma.

Wuerttemberg. The plants had wintered well, but were off to a late start as a consequence of cool weather and **Nightfrosts**. Warmer weather by the middle of May 1954 benefitted growth and welcome rains fell by the end of May. The vines had reached half the height of the trellises by mid-June and there was a good development of **Laterals**. **Aphids** had to be controlled. There were some local damages by **Hail** at the end of June.

The month of July was too cool generally and the weather was unstable. The plants had reached the height of the trellises by the middle of July and were partially overhanging. Early varieties were in full **Bloom** at the beginning of August, while late varieties at that time showed the first **Burrs**. The weather was generally dry and warmer. The **Formation of the Cones** began during the first half of August on early hops, while late hops were in full **Bloom**. **Picking** of early hops was finished by the middle of September, but the ripening of late hops was still retarded at that time.

Quality. The cones were somewhat smaller in size than the year before. The hops were not always uniform in colour, but lupulin of characteristic aroma was amply present.

Hersbrucker Gebirge. Spring work which set in at the beginning of April was hampered by inclement weather and finished about the end of that month. **Rootrot** was more noticeable than in former years. Precipitations during April improved subsoil moisture and warm weather at the beginning of May resulted in vigorous growth.

The month of May, however, was too cold in general for the development of the hops. Warmer weather set in at the beginning of June. **Red Spider** was sporadically present and **Aphids** had to be carefully controlled. Heavy rains at the beginning of July 1954 resulted in cooler temperatures. The stand of the gardens continued irregular, but most hops had reached the height of the trellises. Growth of laterals was unequal. **Burrs** on early hops appeared during the second half of July, but not so plentiful as expected. Early varieties were in full **Bloom** by the beginning of August, while late hops at that time showed only the first burrs. There were local **Storm Damages** by the middle of August. Warm and dry weather during the second half of August could have been favourable for the formation of the cones, but **Downy Mildew** appeared especially in lower valley locations. Subsequent discolourations considerably reduced the crop and resulted sporadically in precipitate picking. The harvest began about September 6th and was finished around September 20th.

Quality. The size of Hersbruck hops was more irregular than in 1953. There appeared discolourations by downy mildew and as a consequence of wet growth. Lupulin and aroma were equal to the year before. Kilning of hops by farmers could still be improved.

Crop Estimate 1954.

The annual inspection of the districts of production by the end of August 1954 resulted in the following estimates:

	Yield estimate lbs.	Yield harvested lbs.
Hallertau	23,150,000—24,250,000	22,979,869
Spalt	3,400,000	3,031,986
Tettnang	2,750,000	2,555,462
Hersbruck	2,300,000	1,540,905
Wuerttemberg	760,000	644,845
Jura	430,000	461,974
Other districts	210,000	218,696
Total	<u>33,000,000—34,100,000</u>	<u>31,433,738</u>

Bitter Values of Crop 1954.

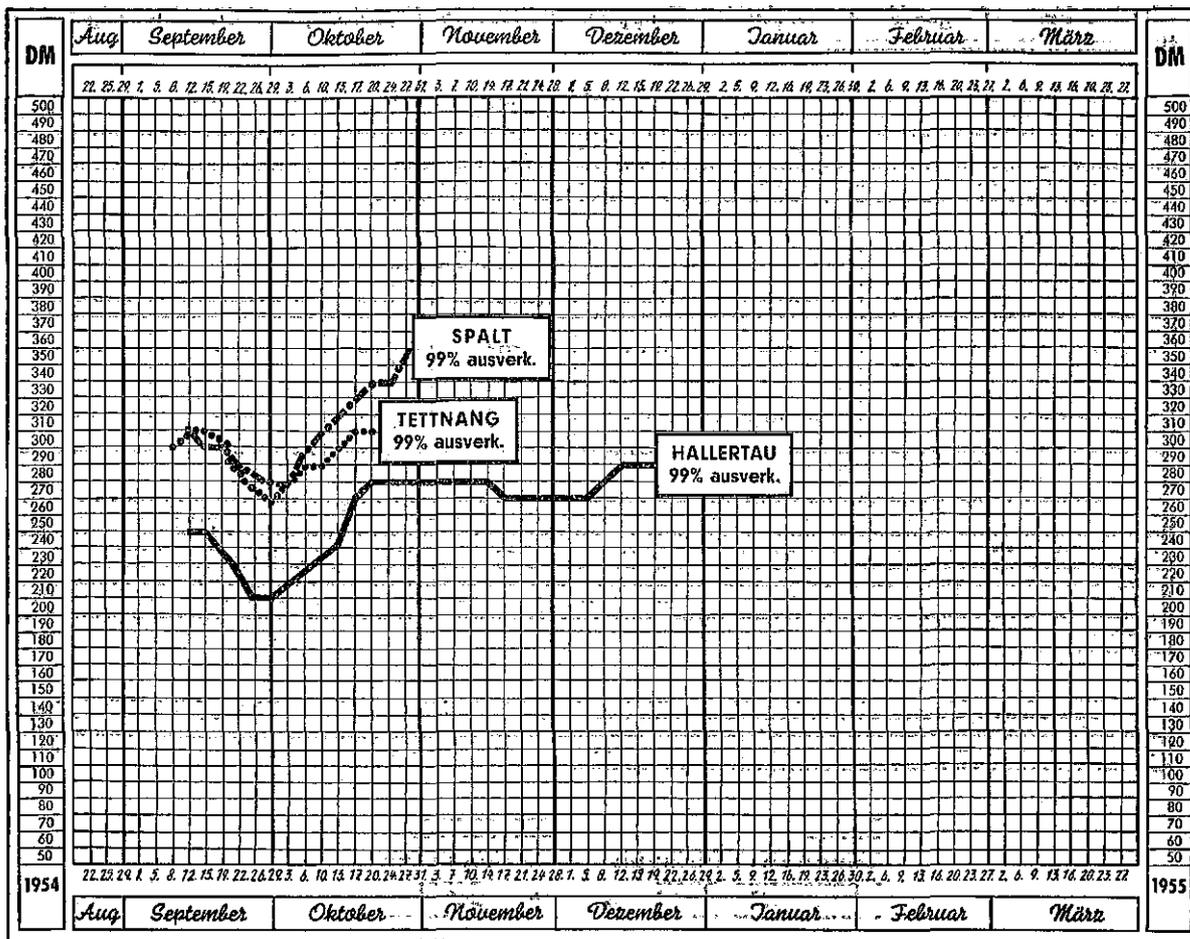
Origin	total resin content anhydric	Soft Resins %	Humu- lon %	Lupulon + Frac- tions of soft resin %	Hard resins %	Bitter value Wöllmer				
Hallertau	17.6	15.5	88.07	6.4	36.36	9.1	51.71	2.1	11.93	7.4
Hallertau/Au	17.7	16.0	90.40	6.3	35.60	9.7	54.80	1.7	9.60	7.4
Hallertau/Wolnzach	18.4	16.2	88.04	6.3	34.24	9.9	53.80	2.2	11.96	7.4
Spalt	17.6	15.1	85.80	5.7	32.40	9.4	53.40	2.5	14.20	6.7
Tettnang	18.0	15.7	87.22	5.9	32.78	9.8	54.44	2.3	12.78	7.0
Wuerttemberg	17.2	15.1	87.79	5.8	33.72	9.3	54.07	2.1	12.21	6.8
Hersbruck	17.8	16.0	89.89	6.4	35.96	9.6	53.93	1.8	10.11	7.4
Rheinpfalz	18.0	16.1	89.07	6.7	37.18	9.4	51.89	1.9	10.93	7.8
Alsace	14.0	11.7	83.57	3.2	22.86	8.5	60.71	2.3	16.43	4.2
Poperinghe	14.4	11.3	78.47	3.0	20.83	8.3	57.64	3.1	21.53	3.9
Saaz	14.9	13.5	90.60	5.3	35.57	8.2	55.03	1.4	9.40	6.2
Jugoslavia	15.8	14.3	90.50	8.1	51.20	6.0	38.50	1.7	9.90	8.8
Backa	16.9	15.0	88.76	5.9	34.91	9.1	53.85	1.9	11.24	7.0
English Fuggles	14.6	12.1	82.88	2.4	16.44	9.7	66.44	2.5	17.12	3.5
U.S. Seedless	14.1	11.7	82.98	4.7	33.33	7.0	49.65	2.4	17.02	5.5
Russia	16.0	12.0	75.00	4.3	26.87	7.7	48.13	4.0	25.00	5.2

Hop Purchases Crop 1954 in Germany.

Estimates in all circles about the possible development of the hop market 1954/55 were strongly overshadowed by considerable inventories of crop 1953 in brewers' hands as well as by reduced hopping rates and a generally downward trend in the hop world market. In addition to this, unusual uncertainty prevailed regarding the influence of the new hop cooperatives on the market. These retarding moments notwithstanding, trading in the especially demanded Tettnang hops opened briskly. The market started rather firm in Hallertau, Spalt, and the other districts as well, but demand slackened perceptibly after initial necessities had been covered and prices declined. Farmers who were disappointed about this development delivered their hops in growing proportion to the cooperatives which took over considerable quantities especially in the Hallertau.

The progressive scarcity of free available hops and the publication of quotations by the cooperatives resulted in quick sales of stocks still available in first hands at rising prices. Trading circles were busy obtaining cover for their sales after which a perceptible quiet settled on the market by mid-October 1954. At that date, demand on the world market was covered by more attractively priced hops from Jugoslavia, Czechoslovakia and the U.S.A.

Development of quotations crop 1954



HALLERTAU — SPALT — TETT NANG Quotations per Ztr. of 50 kg

Tett nang. On September 20th, 1954, about 40% of hops in this district were already sold under active trading on the basis of DM 300.—/330.— (purchases on farms by breweries up to DM 350.—/375.—). Slower demand resulted in decreasing prices until DM 270.—/290.— by the end of September. On this basis, the district of Tett nang was sold out at the beginning of October with the exception of small lots either of lower quality or in hands of speculative farmers. These final quantities were sold until the third decade of October at prices up to DM 310.— as demand picked up again.

Spalt. Purchasing activities developed slower in this district as first necessities were generally covered in Tett nang hops. First prices were indicated on the basis of DM 300.—/340.— but quotations decreased until DM 280.—/300.— at the beginning of October. Trading became much brisker during the second week of October and quotations rose sharply. Last available quantities changed hands at top prices by the end of October.

Hallertau. Tentative purchases began on the basis of DM 230.—/250.—, whereas breweries purchasing on farms paid up to DM 50.—/60.— more. Demand was slow and quotations crumbled away until DM 200.—/210.— by end of September/beginning of October. At that time, the Cooperative accepted hops against DM 150.— per 50 kilos cash on delivery, whereas additional payments were to be made after disposal of these hops. This appeared attractive to farmers and considerable quantities were put into the hands of the Cooperative within a very few days. Stocks available on farms became scarcer and higher prices were the consequence. Quotations were up to DM 250.—/270.— by mid-October and last free lots changed hands in December on a basis of DM 270.—/290.—.

Hersbrucker Gebirge. There was only a reluctant start of purchases in this district as well. Prices paid during the first half of September fluctuated around DM 200.—. Although a considerable reduction in harvest expectations became evident, prices continued to decrease on a completely quiet market until DM 170.—/185.— at the beginning of October. A suddenly revived demand and the activities of the Cooperative resulted in a quick sellout of this district, where only two thirds of crop estimate were harvested. Quotations reached DM 220.—/240.— under active trading by mid-October.

German Hop-Cooperatives

Wuerttemberg. Purchasing of Wuerttemberg hops begins always somewhat later than in other areas. Relatively few lots changed hands during the beginning of the season on a basis of DM 180.—/195.—. Activities suddenly became frantic and the district was sold out during the days from October 6th to 10th, 1954, by purchases from trading circles and the Cooperative.

The development of the German hop market 1954 has been decidedly influenced by the *Hopfen-Verwertungs-Genossenschaften*. It appears necessary, therefore, to define the origin and the aims of this organization.

Farmers were very much disappointed at the pricing situation for hops of the record crop of 1953. This resulted in the promotion of Cooperatives in almost all districts with the aim of maintaining prices on an acceptable level for farmers. The number of members and of shares subscribed on November 1st, 1954, has been indicated as follows:

	Hop-Cooperative					
	Hallertau	Spalt	Hersbruck	Jura	Wuerttemberg	Rheinpfalz
Members	5,176	270	621	115	230	249
Shares total	39,595	1,286	3,000	563	510	249

Shares have been subscribed by members on the basis of one share per one tenth of one hectare hop acreage (about 4 shares per acre). The value of shares amounts to DM 40.— for the Cooperative Hersbruck and DM 50.— for the other Cooperatives. Members in addition are in bond for double the value of shares. Regarding the Cooperative Rheinpfalz, every member is limited to one share of DM 10.— only, but the additional bond for each share amounts to DM 350.—.

The above Cooperatives together with the *Bayerische Waren-Vermittlung (BAYWA)* have formed a joint organization called *Deutsche Hopfen-Verwertungs-Zentrale, Nürnberg*. The capital of DM 100,000.— has been subscribed as follows:

Baywa	DM 60,000.—
Cooperative Hallertau	„ 26,500.—
Cooperative Spalt	„ 5,000.—
Cooperative Hersbruck	„ 5,000.—
Cooperative Wuerttemberg	„ 2,000.—
Cooperative Jura	„ 1,000.—
Cooperative Pfalz	„ 500.—
	<u>DM 100,000.—</u>

Financial operations have been taken over by the *Bayerische Raiffeisen-Zentrale* and the local *Raiffeisen-Kassen*. There are no State's Guarantees.

A new hop warehouse has been opened in Mainburg/Hallertau on September 22nd, 1954. Prices for hops in hands of the Cooperatives were published on October 11th, 1954. Informations up to now show the following activities of the regional Cooperatives:

Spalt. Only 425 Ztr. have been taken over and sold to the trade at DM 380.—. Farmers received a payment of DM 342.— for most of these hops. Only about one sixth part of same was classified as second quality and valued at DM 330.—.

Jura. This Cooperative handled about 1200 Ztr. which were sold until the spring of 1955 on a basis of DM 285.—/300.—. Farmers received DM 260.— for quality I, DM 245.— for quality II and DM 230.— for quality III.

Hersbrucker Gebirge. The quantity of hops accepted by the Cooperative was estimated at 3,200 Ztr. As a result of the smaller crop in this district, all hops were sold to the trade until the end of 1954. Prices ranged from DM 250.—/270.—, whereas farmers received the following payments: quality I DM 230.—, quality II DM 213.—, quality III DM 202.—.

Wuerttemberg. Special demand for Wuerttemberg hops facilitated the sale of about 1,200 Ztr. in hands of the Cooperative. These hops were sold out already by the middle of November 1954 on a basis of DM 250.—/270.—. Farmers were paid as follows: quality I DM 225.—, quality II DM 220.—, quality III DM 210.—.

Hallertau. The bulk of the hops handled by the Cooperatives has been taken over in this district where about 60,000 Ztr. were accumulated. Until now, farmers received only a first payment of DM 150.— and an additional instalment of DM 30.—. Further payments have not been possible, as the Cooperative continued to maintain a considerable unsold inventory. In order to preserve the quality of the unsold hops, the Cooperative began to pack same in cylindrical bales during the spring of 1955. In mid-June, 1955, a relief action for these hops was started among the German breweries.

The maladjustment of supply since October 1954 was strongly felt on the Nürnberg Market. The customary brokerage offers were practically discontinued as so few free hops were available. Trading was mostly done in hops from the Cooperative's stocks. Activities, however, were slow as the general level of prices was felt to be too high. Hops from the Cooperatives were generally priced somewhat higher than occasionally available free lots.

**Nürnberg
Market**

It became exceedingly difficult to dispose of the German hops crop 1954 from mid-October 1954 onward, and the price level may be considered the only motive for this situation. The German hop market depends upon exports and cannot as part of the world market isolate itself against its fluctuations. The falling level for US-hops indicated the general trend. Under the actual situation of hop production, the German Hop Cooperative could not realize its intention of supporting prices for German hops by temporarily denying its stocks to the market. There were sufficient possibilities on the world market to obtain supplies of hops from other sources.

Market Survey

Demand was slower than normal as a consequence of considerable inventories especially in German breweries. Important purchases from the record crop 1953 may have been the reason. In addition, exports of German hops are hampered by sometimes irksome clearing difficulties.

Under slack demand, additional purchases can be stimulated only by favourable sale's conditions. It is, of course, possible to obtain higher prices for those quantities which have to be purchased by consumers if part of the commodity is withheld from the market. As a final result, however, unsold stocks may accumulate to be carried over into the next season and adversely influence the market.

The Cooperative's pricing policy for Hallertau hops stimulated sales of more attractively quoted qualities especially of Hersbrucker Gebirge and Wuerttemberg. Sale's expectancies of the Hallertau Cooperative, however, had not been realized by early summer 1955. Following an arrangement with the Cooperative, the German Brewers' Union published an appeal in mid-June 1955 asking the German brewing industry to purchase an additional quantity of hops at the rate of 8 Ztr. per 10,000 hl of production so that about 28,000 Ztr. of unsold Hallertau hops might find a home. The price to breweries was fixed at DM 280.— per 50 kilos.

**Emergency
Sale of
Hops Crop
1954**

Considerable inventories in breweries as well as the approaching new crop 1955 and not too good weather for beer sales in the spring and early summer resulted in a slow action only. Quantities sold up to now are limited to a few thousand Ztr. which is insignificant compared to the Cooperative's stocks.

The Hop Farmers' Association which caused export licences to be discontinued in the autumn of 1953 submitted an application for the re-introduction of same in the autumn of 1954. The *Ernährungsministerium*, however, during a discussion with interested circles in Nürnberg on September 3rd, 1954, declared such a measure as impracticable.

Export Licences

By a decision of October 21st, 1954, (BFH. No. V 179/54 U) the *Bundesfinanzhof* resolved that hops continue to be considered an agricultural product even if kilned and sulphured. Farmers, therefore, for the sale of such hops are subject to a turnover tax of only 1.5%, whereas traders have to pay 4%.

Turnover Tax

The *Finanzgericht München* resolved on January 10th, 1955, (FG III 115/54) that packing into one single lot hops from different zones of one district of production is subject to a turnover tax of 4%. Legal action has been taken against this unprecedented decision.

The *Bundesministerium für Ernährung, Landwirtschaft und Forsten*, by a publication in the *Bundesgesetzblatt I* Nr. 26, S. 256, dated August 16th, 1954, rescinded §25 and §27 section 2 of the regulation which had been in force since 1930. The facility of shipping German hops for exports without seal and certificate thus has been discontinued.

**Regulation
of Hop
Provenience**

**German Hop Imports
Crop 1954**

The following lots of hops have been imported from September 1st, 1954, until April 30th, 1955;

Great Britain	5,071 lbs.
Jugoslavia	661 lbs.
Netherlands	2,205 lbs.
Czechoslovakia	241,404 lbs.
U.S.A.	29,762 lbs.
Total	<u>279,103 lbs.</u>

**German Hop Exports
Crop 1954**

Export of German Hops Crop 1954					
September 1st, 1954 — April 30th, 1955					
Country	lbs.	lbs.	Country	lbs.	lbs.
Belgium	929,900		b. f.	3,847,467	6,987,700
Denmark	904,988		Venezuela	105,821	
Finland	141,094		AMERICA		3,953,288
France	719,140		Ethiopia	13,228	
Greece	88,184		Algiers	19,400	
Great Britain	330,910		Angola	1,102	
Italy	571,432		Congo	50,265	
Luxembourg	104,278		French Equat. Africa	4,409	
Netherlands	492,949		French Morocco . . .	37,699	
Norway	173,282		French West Africa . .	57,760	
Austria	717,818		Kenya-Uganda	33,069	
Portugal	64,595		Lybia	1,323	
Rumania	154,322		Mozambique	13,228	
Saar	97,443		Union of South Africa	26,676	
Spain	268,962		South West Africa . . .	7,275	
Sweden	713,188		Tanganyika	2,105	
Switzerland	512,790		Tanger	1,543	
Triest	2,425		Tunisia	25,573	
EUROPE		6,987,700	AFRICA		294,755
Argentina	440,920		China	6,614	
Bolivia	5,071		Cyprus	5,732	
Brazil	276,457		Hongkong	10,362	
Brit. West Indies . . .	32,848		India	11,243	
Chile	30,423		Indonesia	22,046	
Columbia	191,580		Iran	17,637	
Costa Rica	4,630		Israel	11,464	
Ecuador	16,534		Japan	167,550	
Honduras	15,432		Korea	11,023	
Mexico	68,343		Libanon	10,141	
Paraguay	22,046		Malayan States	13,228	
Peru	30,864		Philippine Isl.	59,745	
Salvador	4,409		Thailand	34,171	
Uruguay	48,281		ASIA		380,956
U. S. A.	2,659,629		Australia	5,511	
c. f.	3,847,467	6,987,700	AUSTRALIA		5,511
			Total		<u>11,622,210</u>

Regulation of Hop Planting

In order to control the planting of hops in Germany, a regulation has been published by the *Bundesministerium für Ernährung, Landwirtschaft und Forsten*, dated April 13th, 1954 (*Bundesgesetzblatt I S. 92*).

According to this regulation, actual hop acreages have to be verified annually during the second half of May. These figures serve for the determination of the hop areas to be allotted to the different *Länder* for the next following year. New plantings of hops are subject to approval and the discontinuation of hop growing has to be registered.

The market situation for German Hops reflected itself in the acreage verified in May 1954 which shows a reduction of 1,177 acres = abt. 5.5% as against 1953.

Hop Acreage
1954

District	1939 Acreage acres	1954		
		Existing acreage acres	Additional acreage acres	Total acres
Hallertau	11,317	13,037	170	13,207
Spalt	2,276	2,157	54	2,211
Hersbruck	2,118	1,586	15	1,601
Jura	200	324	2	326
Tettngang *)	—	22	2	25
Aischgrund	200 ¹⁾	10	—	10
Other Districts	—	17	—	17
Bavaria	16,111	17,153	243	17,397
Wuerttemberg/RHW.	1,223	588	7	595
Tettngang **)	1,636	1,675	47	1,722
Baden	440	84	2	86
Baden-Wuerttemberg	3,299	2,347	56	2,404
Pfalz	151	74	—	74
Rheinland-Pfalz	151	74	—	74
Germany	19,561	19,574	299	19,875

*) areas in Bavaria

**) except areas in Bavaria

¹⁾ 1938

The decrease of new gardens by about 2,100 acres against 1953 is especially remarkable. The smaller total area has not influenced so much the bulk of the harvest, as the acreage in full bearing is about 924 acres greater than the year before. The shrinking of areas in the various districts of production is as follows:

District	acres	%	District	acres	%
Hallertau	712	5	b. f.	1,031	—
Spalt	44	2	Wuerttemberg	79	12
Hersbruck	245	13	Tettngang	37	2
Jura	30	8	Others	30	—
c. f.	1,031	—	Total	1,177	5.5

A continued tendency to shift hop acreage to other crops is not impossible. A reduction by official decree, however, appears improbable.

Acreage 1955

The existing area 1954 in the meantime has been declared valid for the year 1955 as well. An increase of acreage over and above the present situation, therefore, is not possible.

Considerable quantities of hops crop 1954 have been purchased in France, England and other countries. Purchases in Western Germany up to now are indicated at about 9,700 Ztr. which is only about 40% of shipments of hops crop 1953. There is a possibility that the D.D.R. might still accept for about DM. 2,000,000.— hops crop 1954 from Western Germany.

Deutsche
Demokratische
Republik
(D.D.R.)

Commercial agreements with the D.D.R. include shipments of agricultural products in 1955 valued at DM 80,000,000.— (*Bundesanzeiger* Nr. 15 of January 22nd, 1955). This amount includes DM 10,000,000.— for hops (*Bundesanzeiger* Nr. 31 of February 15th, 1955). Export licences can be obtained only within the scope of the compensation accounts. Shippers of hops cannot confirm a sale definitely until an export licence has been granted.

Czechoslovakia

The weather was exceptionally dry during the spring and early summer of 1954. Strong rainfalls in July brought sometimes too much humidity and resulted in local damages by **Floods**. Hops had attained the height of the trellises generally by mid-July. Early cut gardens at that time were in part overhanging the trellises, while late cut gardens were retarded. Pests and diseases were controlled and airplanes were occasionally used for dusting and spraying. **Bloom** conformed to expectations and warmer weather in August increased crop prospects.

Picking began sporadically on August 17th/18th and continued under general good weather until September 20th in certain areas. Pickers were not always plentiful and received Kc. 2.26 per basket (30 litres), if a quota of 10 baskets per day was picked. Pickers which worked at least one week and over-fulfilled their quota received a premium.

Official prices for hops which are scaled according to 7 types of quality are Kc. 720.—/1220.— (DM 415.—/710.—) per 50 kilos net. Farmers received a premium of 20% for those quantities delivered over and above 90% of the official production quota, whereas for quantities over 100% of quota a premium of 40% is paid. In addition to this a premium of Kc. 230.—/50.— (DM 134.—/29.—) per 50 kilos net is paid for hops of quality I-III.

U.S.S.R.

Newspapers report that 80% of the Russian hops are produced in the Ukraine. The following districts are indicated: Shitomir, Rowno, Kiev, Lemberg (Lwow), Wolynssky, Chmelnik, Winnitza, Tarnopol, Sumsky, Drohobytsch. Yields in 1953 are indicated at 1600 lbs. per acre. Furthermore, hops are produced near Moscow and in the republic of Tshuwashia (on the Wolga). This district reports yields of 1,200 to 1,425 lbs. per acre.

Russian hops have been offered on the world market in 1954/55 for the first time since the war. The quality of samples submitted as well as prices asked did not stimulate trading.

Poland

It is reported that a hop station exists in Lublin. Experimental gardens in Pulawy are said to have produced 2,360 lbs. per acre in 1953. Average yields per acre in the Polish hop production are indicated as follows: 1951 = 680 lbs. 1952 = 425 lbs. 1953 = 835 lbs.

Hungary

There existed already before the war a not too important production of hops in this country in the area bordering on the Backa (Jugoslavia). It is reported that the acreage there has been increased in the meantime. It seems that individual breweries in Hungary have installed hop gardens in the vicinity of their plants. Hops furthermore have been planted in the lowlands between the rivers Danube and Theiss in the district of Czegléd-Szolnog. Slips have been supplied from Czechoslovakia. Yields are indicated at 625 lbs. per acre, but it seems that the kilning of the crop is subject to difficulties.

Jugoslavia

Spring work was finished in good time during April 1954 in the district of Sanntal (Slovenia). Growth was off to a slow start by reason of dryness which, however, was relieved during the following months by sometimes more than ample precipitations.

Jan.	Febr.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
33,3	30,4	74,3	55,9	158,4	232	131,3	91,4	148,4	92,8	94,7	71,3 mm

Fleas made sporadically strong appearances but were no danger as a consequence of early measures of control and the same applies to **Aphids** which appeared later. Preventive sprayings against **Downy Mildew** were only necessary up to four times. **Red Spider** was restrained by weather conditions. The hops attained the height of the trellises by mid-July and showed a good overhang and plentiful laterals.

There were local damages by **Hail**. About 250 acres of hop yards were completely destroyed by a **Cloudburst** at the beginning of June. Some **Storm Damages** occurred shortly before the harvest. **Picking** began sporadically on August 18th, was general on August 23rd, and finished under good weather conditions on September 5th, 1954. There was no scarcity of labour. The quality of the hops was generally better than the year before, although colour had more or less suffered from **Windwhipping**. The quality of the crop was judged to be 79% choice, 20% medium and only 1% off-grade.

Hops are handled centrally and were speedily sold at world market levels. Farmers received Dinar 10,000.—/23,500.— per 50 kilos (DM 140.—/329.—) according to classification in four grades. In addition, producers receive artificial fertilizer at favourable conditions, whereas the supply of hop poles does not yet seem to correspond to demand.

The winter of 1953/54 was cold and **Snowcover** was not sufficient. The weather was generally dry and cool during the spring and early summer, so that development of the plants was retarded.

Belgium

District	Jan.	Febr.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Poperinghe	59.3	54.9	52.0	11.9	46.2	63.6	70.0	83.8	67.1	54.7	59.5	23.8 mm
Alost	56.0	50.0	59.3	20.3	59.7	55.4	114.6	95.8	83.3	65.4	41.5	42.9 mm

Stronger precipitations since the end of May brought the necessary humidity, but the weather continued to be cool and the average growth was about 14 days later than usual. Spraying against **Downy Mildew** were regularly effected and **Aphids** had to be controlled. The plants attained the height of the trellises between July 10th/20th. At that time, too, the **Bloom** began which was especially abundant on the Hallertau variety. Cones, however, remained smaller than normal. The hops were generally of good green colour but the quality was not quite so good as the year before.

Picking began sporadically on September 2nd, was general on September 10th, and finished under good weather conditions about September 20th. Sufficient pickers were available. The crop was estimated as 65 % choice, 25 % medium and 10 % off-grade.

About 90 % of Belgian hops were in second hands against mid-November 1954. The district of **Alost** was sold out already by the middle of October, whereas in **Poperinghe** several hundred hundredweights remained still unsold in March 1955. Prices for Replant Hallertau, which constitute about 75 % of the crop, started in September on a basis of bfrs. 2,500.—/3,000.—. Quotations rose during the season until bfrs. 3,000.—/3,300.—, whereafter slower demand resulted in receding prices.

Other qualities produced in Belgium make up about 25 % of the crop and were sold out relatively early. Growing of the varieties Fuggles and Groene Bel is on the decline and Replant Tettang also is not favoured any longer. New varieties include "Northern Brewer" and Replant Saaz.

The following quantities of hops crop 1954 have been imported from September 1st, 1954, until March 31st, 1955:

Western Germany	990,306	b. f.	1,251,551
U.S.A.	220,460	England	82,011
France	40,565	Czechoslovakia	1,072,538
Netherlands	220	Jugoslavia	182,320
c. f.	1,251,551		2,588,420

Exports from September 1st, 1954, until March 31st, 1955 are shown as follows:

Austria	59,304	b. f.	199,736
Cyprus	220	Mozambique.	1,543
Belgian Congo	22,046	Netherlands.	14,991
Denmark	2,866	England	5,512
U.S.A.	54,454	Sudan	1,984
Malayan States	1,323	Sweden	13,448
Finland	5,511	Switzerland	7,275
India	14,550	Tanger	1,103
Ireland	39,462	Union of South Africa	21,826
c. f.	199,736		267,418

Spring weather in the Alsace was relatively dry in 1954.

Jan.	Febr.	March	April	May	June	July	August	Sept.
51.6	26.2	16.1	42.0	72.2	35.9	79.9	126.4	118.3 mm

Growth developed slowly, but there were scarcely any diseases. Between six and eight sprayings against Downy Mildew were effected. The hops reached the height of the trellises by the end of July and remained generally rather pointed with little overhang.

Picking began as usual on the first Monday in September and was finished under inconstant weather within about three weeks. The crop was estimated at about 80 % choice and 20 % medium; there were no off-grade qualities. The colour of the Alsace hops crop 1954 was fine and green. The sizing of the cones was somewhat irregular and the lupulin content was a little lower than the year before.

The cooperative accepted about 16,000 cwts. paying a first instalment of ffrs. 10,000.— per 50 kilos, whereas the trade purchased about 14,000 cwts. at prices ranging from ffrs. 20,000.— to ffrs. 22,000.—.

In Flanders the hops suffered from cold and rainy weather. It was necessary to spray up to 20 times against Downy Mildew. The plants reached the height of the trellises only against the end of July and remained mostly pointed. Picking went on during the first two decades of September 1954 and was hampered by rain only during the first few days. The hops were of uniform green colour and estimates of quality were somewhat better than the year before. There were about 35 % choice, 50 % medium and 15 % off-grade qualities.

Prices set in on a basis of ffrs. 15,000.— but rose quickly and reached ffrs. 18/20,000.— by the beginning of November. Half of the crop was already sold at the beginning of October and even off-grade qualities were disposed of until the spring of 1955.

Hops of the Hallertau variety are cultivated on an increasing scale. Male plants are no longer tolerated in these gardens, whereas they continue to exist on the Fuggles acreage which is still estimated at about 300 acres.

French hop exports during the calendar year 1954 were as follows:

Destination	Jan. — June 1954 lbs.	July — Dec. 1954 lbs.	1954 Total lbs.
Western Germany	83,113	—	83,113
Austria	—	27,778	27,778
Denmark	11,023	—	11,023
Spain	26,676	3,307	29,983
Finland	7,716	8,818	16,534
Great Britain	—	2,425	2,425
Hungary	49,603	—	49,603
Italy	441	3,307	3,748
Norway	882	882	1,764
Netherlands	—	1,323	1,323
Sweden	220	661	881
Switzerland	17,416	11,684	29,100
Turkey	—	2,205	2,205
Benelux	27,998	7,273	35,273
Deutsche Demokratische Republik	—	377,427	377,427
Brazil	6,614	22,046	28,660
Australia	—	220	220
Equat. Africa	2,866	1,984	4,850
Algiers	27,337	6,834	34,171
French Cameroon	8,818	27,117	35,935
New-Caledonia	1,543	220	1,763
French Ocean Isl.	1,323	—	1,323
Indochina	171,518	—	171,518
Madagascar	1,764	—	1,764
French Morocco	2,425	3,307	5,732
Martinique	—	1,102	1,102
Réunion	—	661	661
Total	449,296	510,583	959,879

In comparison France imported the following quantities during the calendar year 1954:

Countries	Jan.—June 1954 lbs.	July—Dec. 1954 lbs.	1954 Total lbs.
Western Germany	832,677	11,243	843,920
Czechoslovakia	136,244	—	136,244
	<u>968,921</u>	<u>11,243</u>	<u>980,164</u>

In the district of **Muehlviertel** the hop gardens suffered from the wet and cool weather during 1954. Spraying against **Downy Mildew** were effected nine times on the average. The hops reached the height of the trellises on July 10 th and showed a good overhang. **Picking** went on from August 27 th to September 14 th, 1954.

Austria

The quality of the crop was better on the average than in 1953. The estimates were 50 % choice, 35 % medium and 15 % off-grade.

20,940 lbs. were harvested on the existing acreage of 37 acres (about 12 acres of new gardens). All hops have been purchased according to the contract with the Brewers' Union of Austria.

In **Styria** hops are grown in the district of Leutschach. The weather was rainy during the whole vegetative period. **Picking** began on August 30 th, 1954, and was finished within one week. The crop amounted to 14,220 lbs. on a total acreage of 22.4 acres (about 635 lbs. per acre).

Switzerland

Development of the hops was retarded as a consequence of cold and wet weather. Rainfalls were distributed as follows:

Jan.	Febr.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
37	38	11	59	88	77	131	150	118	48	42	66 mm

The height of the trellises was reached on July 8th, 1954. **Bloom** was late and appeared on July 20 th. The hops showed a strong overhang but there were no cones on the lower third of the vines.

Picking went on from August 26th to September 20th under good weather conditions. There were not always sufficient pickers available. The sizing of the cones was more uniform than the year before. The hops were rich in lupulin, but somewhat spotty in colour. Estimates of quality indicate 64.6 % choice, 33.8 % medium and only 1.6 % off-grade. The total harvest was 26,240 lbs. on 17.3 acres (1,500 lbs. per acre).

All hops harvested were purchased by sponsoring breweries. Prices of sfrs. 400.— for first quality, sfrs. 380.— for second and sfrs. 360.— for third quality included a price support payment of sfrs. 60.— per Zentner.

The rainy weather in 1954 favoured pests and diseases but there were no **Frost Damages**. Rainfalls were distributed as follows:

Sweden

April	May	June	July	Aug.	Sept.
44	38	48	104	90,5	70,5 mm

Preventive sprayings against **Downy Mildew** were effected every ten days on the average. The plants attained the height of the trellises on June 26 th. Hops type Saaz showed a rich overhang. **Picking** began on August 30th and went on under generally rainy weather until September 29 th. There was no scarcity of labour.

The quality was judged less good than the year before as a consequence of weather conditions in 1954. There were no choice hops, only 90 % medium and 10 % off-grade. The total crop amounted to about 8,050 lbs. (about 350 lbs. per acre).

An increased hop production in Skåne has been taken under consideration.

The Spanish acreage has been extended in 1954 by about 150 acres (250,000 plants). The results of production are judged to be best in **León** and second best in the district of **Galicia**. Prospects of hop cultivation in the district of **Asturias** and **Guipuzcoa** are judged less favourable. Harvest results have been indicated as follows:

Spain

León	174,163 lbs.
Galicia	286,598 lbs.
Asturias and Guipuzcoa	44,092 lbs.
	<u>504,853 lbs.</u>

All hops have been purchased by the breweries at the price of Ptas. 80.— per kilo (DM 432.— per 50 kilos).

England

The spring of 1954 was mostly dry and was followed by a wet summer.

District	Jan.	Febr.	March	April	May	June	July	August	Sept.
Kent	1.64	2.25	2.40	0.38	1.67	2.56	2.45	2.96	1.53 inches
Worcester	1.09	1.82	1.96	0.49	2.84	3.14	2.40	3.52	1.15 inches

It was sometimes impossible to work the waterlogged gardens, so that the control of pests and diseases was occasionally interrupted. The quantity as well as the quality of the crop had to show the consequences. Especially during the months of July and August 1954 indications were not too good for the quality of the crop as constant rains and lack of sunshine adversely influenced the plants. All these unfavourable circumstances notwithstanding the harvested crop was discoloured only to a moderate extent. The difficult weather conditions as well as lack of pickers increased the use of hop picking machines.

The proportion of sound hops was greater than expected. The crop of Golding varieties was more reduced than the quantity of Fuggles harvested. Fuggles which brought about 74% of the total crop were judged as 65% choice, 23% medium and 12% off-grade. Golding varieties (21% of the crop) brought 86% choice, 12% medium and only 2% off-grade qualities. The English hops crop 1954 were greener on the average as against a normal crop with a colour more on the yellowish side.

All harvested hops were sold. The average price to farmers was fixed at £ 29.— per cwt. (DM 336.— per 50 kilos). The increase of the average price as against 1953 is a consequence of lower demand. There are apprehensions that this development may adversely influence the competitive situation of English hops on the world market.

Exports of English Hops Crop 1954			
September 1 st, 1954 — April 30 th, 1955			
Country	cwts.	Country	cwts.
Australia	6,023	b. f.	37,621
Belgium	690	Netherlands	53
Burma	2	Pakistan	3
Canada	709	Rhodesia and Nyassa	720
Ceylon	187	Sierra Leone	2
Fiji-Islands	24	Singapore	249
Finland	79	Sudan	3
Gold-Coast	127	Union of South Africa	351
Iraq	81	Sweden	12
Eire	28,707	Switzerland	2
Jamaica	18	Tanganyika	43
Channel Islands	330	Trinidad	22
Kenya	326	Western Samoa and Ross	4
Federation of Malaya	19	Zansibar and Pemba	2
Malta and Gozo	294		
New-Zealand	5	Total	39,087
c. f.	37,621	1 cwt. = 50,8 kg	

U. S. A.

California. Growth started under warm weather already during February 1954 in the districts of **Sonoma** and **Mendocino**. Stronger precipitations resulted regionally in **Rootrot**. Rainfalls were distributed as follows:

Jan.	Febr.	March	April	May	June	July	August	Sept.	Oct.	Nov.	Dec.
8.72	7.07	5.51	2.61	1.44	0.36	0.03	0.01	0.41	1.96	4.35	7.25 inch.

No sprayings were effected against **Downy Mildew**. The hops reached the height of the trellises during the first days of July and showed a good overhang. **Picking** began on August 20th, 1954, and was finished within ten days to two weeks. The colour of the hops was greenish-yellow, but there were to be found hops with red discolourations as well. The crop was estimated to be 30% choice, 30% medium and 40% off-grade.

There were no diseases in the district of **Sacramento**. The weather was favourable for the development of the hops and rainfalls were distributed as follows:

Jan.	Febr.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	December
3.26	3.70	3.29	1.88	— .21	—	—	— .35	—	— .02	3.35	4.93 inch.

In this district there is practically no **Downy Mildew**. The height of the trellises was attained by mid-June, and cones ripened even on the lower part of the vines. **Picking** began around August 10 th, and was finished under favourable weather during the first days of September 1954. The colour of the hops was greenish to yellow and the quality was judged to be 90 % choice and only 10 % medium.

Western Oregon. The summer of 1954 was relatively cool, but the hops showed a very satisfactory growth.

Jan.	Febr.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	December
9.99	5.87	3.02	2.70	1.34	2.47	0.31	0.72	1.28	3.45	5.07	6.26 inch.

Against **Downy Mildew** 10-12 dustings were effected on the average. The plants reached the height of the trellises in the beginning of July. The hops on the lower parts of the vines did not ripen completely. Harvest began on August 20 th, and was only once interrupted by rain. **Picking** was finished within ten days. The colour of the hops was better on the average than in 1953. The vines were amply covered with cones which were somewhat smaller in size than usual. Qualities were estimated as follows: 50 % choice, 30 % medium, 20 % off-grade.

Eastern Oregon and Idaho. Good development of the hops in the beginning was retarded by cool weather in June 1954. The hops were ten days later than normal. There were practically no **Frost Damages**. Preventive measures against **Downy Mildew** were not necessary. **Aphids** and **Red Spider** appeared and were controlled with the usual sprays.

Jan.	Febr.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	December
0.81	0.59	1.15	0.60	0.41	1.80	0.10	0.11	0.29	0.37	1.18	2.06 inch.

The plants reached the height of the trellises during the first decade of July. **Picking** began about August 25 th, and was finished during the last decade of September. The weather during the harvest was satisfactory. The hops were not very uniformly green, but the cones were well-sized. Qualities were judged 90 % choice and only 10 % medium.

Washington. In the district of **Yakima** cool weather retarded the development of the hops in the spring of 1954, but later growth offset this delay.

Jan.	Febr.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	December
1.98	0.49	0.51	0.03	0.36	0.39	0.03	0.20	0.83	0.27	1.13	0.33 inch.

There was no **Downy Mildew** present. The plants attained the height of the trellises already in July. **Picking** began about August 22nd and was finished under good weather conditions by the end of September. The hops were generally better ripened than in 1953. Qualities were estimated as follows: 60 % choice, 20 % medium, 20 % off-grade.

Hop picking in the U.S.A. is mechanized practically everywhere. There are sufficient hands for these installations. In the district of **Sonoma** only, part of the crop is still picked by hand and there was some scarcity of labour.

Hop Imports U.S.A. Crop 1954	
September 1 st, 1954 — March 31 st, 1955	
Country	lbs.
Belgium/Luxembourg	24,890
Germany	2,262,955
Jugoslavia	1,593,077
Netherlands	8,267
Total	3,889,189

Hop Imports
U.S.A.

Exports of US-Hops Crop 1954			
September 1st 1954 — March 31st 1955			
Country	lbs.	Country	lbs.
Ethiopia	8,818	b. f.	5,121,332
Angola	2,432	Ireland	430,876
Belgium/Luxembourg	281,648	Japan	29,399
Belgian Congo	33,327	Jugoslavia	358,830
Bolivia	15,282	Mexico	2,721,339
Brazil	410,589	Moçambique	12,147
Canada	1,739,629	Nicaragua	9,503
Canal Zone	6,246	Netherlands	130,857
Chile	469,009	Norway	17,837
Columbia	1,518,342	Pakistan	6,600
Costa Rica	13,238	Panama	53,791
Cuba	246,128	Peru	249,955
Denmark	75,132	Philippine Islands	39,825
Western Germany	2,304	Salvador	14,329
Eastern Germany	27,563	Union of South Africa	109,700
Dominican Republic	5,061	Sweden	6,246
Ecuador	84,400	Switzerland	68,261
Formosa	52,911	Thailand	1,177
Great Britain	6,482	Trinidad	3,308
Guatemala	49,877	Uruguay	132,137
Honduras	70,414	Venezuela	259,951
Hongkong	2,500	Other Countries	78,000
c. f.	5,121,332	Total	9,855,400

Japan

Regarding hop production in the district of **Nagano**, it is reported that the hops attained the height of the trellises in mid-June and showed a good overhang by the middle of July. Rainfalls were distributed as follows:

January	Febr.	March	April	May	June	July	August	September
86	25.3	52.5	74.2	152.7	171.1	131.5	58.3	101.2 mm

The dryness in August 1954 was not favourable for the formation of the cones. **Red Spider** was somewhat more noticeable than in former years and had to be controlled. Spraying against **Downy Mildew** were effected up to 13 times.

Picking went on under good weather from August 20th to 31st. There were sufficient pickers available. **Cones** were somewhat smaller than normal, but of good colour and quality. The crop was estimated at 73% choice, 16% medium and 11% off-grade. All hops were purchased by the sponsoring breweries at a price of Yen 350 per kilo (DM 208.— per 50 kilos).

Union of
South Africa.

In the Southern summer of 1953/54 there appeared extremely high precipitations in October 1953 and dryness during the important months of December 1953 until February 1954. Rainfalls were distributed as follows:

1953								1954			
May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Febr.	March	April
0.54	3.35	2.74	2.87	2.77	6.56	3.06	0.96	0.54	0.92	2.59	2.21 inch.

Development of the hops suffered during the dry summer. The sizing of the **Cones** was imperfect and part of the **Burrs** remained undeveloped. About 10% of the acreage remained unpicked.

It was not necessary to control **Downy Mildew**, whereas **Caterpillars** appeared at the beginning of the season.

The plants attained the height of the trellises in mid-December and showed some overhang. **Picking** began on February 15th, 1954, and was finished on March 17th, 1954. There were not sufficient pickers available. The weather during harvest was hot and dry.

The colour of the harvested hops was good and contents of lupulin satisfactory. According to vegetative conditions there were numerous under-developed cones. The quality of the crop was judged as follows: 40% choice, 35% medium, 25% off-grade.

The hops crop 1955 were picked in March 1955 during the autumn on the Southern hemisphere.

Argentine

Mar del Plata. This district suffered from persistent dryness until the first week of February. After that, crop prospects improved when frequent and strong precipitations set in until picking time. The harvest, however, was about 8,800 lbs. smaller than the year before. The hops were healthy and the total crop was about 39,700 lbs.

Sierra de la Ventana. The dryness in this district was not so persistent and yields were somewhat greater than the year before. Gardens were generally healthy. The total crop amounted to 7,050 lbs.

Rio Negro. Hop gardens could develop normally in this area but yields were lower than the year before. The appearance of **Red Spider** which has already been mentioned in former reports seems to become somewhat more extensive. New gardens had come into full bearing, and the crop was about 17,600 lbs. greater than the year before, resulting in a total harvest of 130,000 lbs.

The relatively mild winter 1954/55 was followed by a cold wave in mid-February 1955 which persisted until the end of March and brought extensive snowfalls.

Growth 1955
in Germany

Hallertau. Spring work could be started not earlier than the end of March and went on during the entire month of April under unstable weather conditions. Constant cool weather with occasional **Night Frosts** retarded growth. Even the month of May was too cold and the hops could only show a better growth in June under more favourable weather. Sprayings against **Downy Mildew** had to be effected with special care as this disease was favoured by weather conditions.

Spalt. Uncovering and cutting began in April and was finished at the beginning of May. The development of the hops which was retarded in May under cool weather improved visibly during the month of June 1955.

Tettang. Spring work was retarded by cold weather even in this district which generally is favoured by a fine climate. Growth improved visibly under warm weather in June 1955.

Hersbrucker Gebirge. A late thaw hampered the uncovering and cutting which began sporadically during the first half of April and was general not sooner than the end of April. Late hops showed some **Root Rot**, whereas early hops had wintered better. Growth was unsatisfactory under cool weather in April and May 1955, but improved in June.

Wuerttemberg. In this district, too, spring work was late by reason of inclement weather. Growth was retarded by almost constantly cold and unfriendly weather and could improve only during the month of June 1955. Some **Hails** did regional damage in the beginning of June.

The general aspect of hop yards was quite healthy in all districts at the beginning of June 1955. Pests are scarcely noticeable and **Downy Mildew** appears only sporadically. Warm and sunny weather is now very necessary to benefit the further development of the hops.

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The compilation of this report has been made possible in many instances by data supplied from observers in many countries, which is hereby gratefully acknowledged.

Hop world market.

Country	Normal Crop 1937 lbs	Crop 1948 lbs	Bumper Crop 1953 lbs
Germany	23,493,099	9,903,173	39,398,406
Czechoslovakia	26,873,523	10,717,994	11,463,920
France	5,280,017	1,356,931	5,897,305
Belgium	2,700,635	1,444,454	3,068,252
Jugoslavia	6,668,915	2,204,600 *)	4,221,368
Poland	3,560,429	—	1,190,484
Spain	—	—	366,515
USSR	2,204,600 *)	3,306,900 *)	5,511,500 *)
Other countries	584,219	—	84,877
Continent	71,365,437	28,934,052	71,202,627
England	26,318,515	30,612,194	30,528,639
Europe	97,683,952	59,546,246	101,731,266
U.S.A.	39,548,209	50,125,329	41,803,184
Canada	1,510,151	2,129,974	1,659,402
Australia	3,141,555	1,478,846	3,462,765
New Zealand		986,999	1,030,320
Japan	—	—	1,543,220
Argentine	—	—	167,550
Union of South Africa	—	330,690	379,853
Total	141,883,867	114,598,084	151,777,560

*) estimate

A comparison of hop production in 1937 and 1953 shows that world crops remained without appreciable changes in spite of the considerably increased output of beer. The total usage of hops can be estimated at about 140,000,000 lbs. per year. **This shows that the hopping rate has been remarkably reduced since before the war.**

The English hop market has succeeded in isolating itself against all outside fluctuations. Hop production in the U.S.A. has increased noticeably during the war, whereas hop growing in Europe at the same time was markedly reduced. The lowest point of European hop production was reached in 1948. Increases of hop acreage in Europe since 1949 in connection with a maintained high production in the U.S.A. finally had to result in the low pricing level for hops in 1953/54.

The further shrinking of U.S.-acreage which became apparent in the spring of 1955 may contribute to a readjustment of the market's balance. The coming development of prices for hops crop 1955 will show whether reductions of acreage in Europe will become necessary. **If prices should be insufficient again it may be expected that the ploughing out of hops will be increased in Germany.**

