BARTH-HAAS GROUP
c/o Joh. Barth & Sohn GmbH & Co. KG
Freiligrathstrasse 7/9 • 90482 Nuremberg
Tel. +49-911-5489-0 • Fax +49-911-5489-330
E-mail: info@johbarth.de • www.barthhaasgroup.com

The new Barth Report Hops 2018/2019
- Press kit -

The new Barth Report is available in the download area of the media library on the Barth-Haas Group website at www.barthhaasgroup.com/de.

BARTH-HAAS GROUP
c/o Joh. Barth & Sohn GmbH & Co. KG
Freiligrathstrasse 7/9 • 90482 Nuremberg
Tel. +49-911-5489-0 • Fax +49-911-5489-330
E-Mail: info@johbarth.de • www.barthhaasgroup.com

Press release

World beer output falls slightly in 2018

- **Growth in Europe, Africa and America, decline in Asia**
- **50 per cent of world beer volume comes from five countries**
- **Germany remains number 5 in world rankings**

Nuremberg, July 2019. "Beer output in 2018 still amounts to roughly 1.9 billion hectolitres, but the picture behind this figure is one of widely varying developments in individual countries", said Stephan Barth, Managing Partner of Joh. Barth & Sohn, at the presentation of the Barth Report to the press in Nuremberg.

He went on to say that the year-on-year decline in world beer output in 2018 was greater than in any year since the Second World War. The principal cause was the fall in output in China totalling nearly 60 million hectolitres. Developments elsewhere were more positive, however, with growth of roughly two per cent in Europe, one per cent in America and nearly two per cent in Africa.

Beer output according to region in 2017 / 2018:

	2017 1.000 hl	2018 1.000 hl	2017 +/-% rel.	2018 +/-% rel.
Europäische Union	394.886	401.059	-1,2%	1,6%
Restliches Europa	125.494	129.997	-2,9%	3,6%
Europa gesamt	**520.380**	**531.056**	**-1,6%**	**2,1%**
Nordamerika	350.513	356.057	-0,1%	1,6%
Mittelamerika/Karibik	23.144	23.281	1,1%	0,6%
Südamerika	224.977	225.384	3,6%	0,2%
Amerika gesamt	**598.634**	**604.722**	**1,3%**	**1,0%**
Asien	**664.060**	**607.334**	**-0,6%**	**-8,5%**
Afrika	**138.613**	**140.937**	**2,5%**	**1,7%**
Australien/Ozeanien	**20.715**	**20.553**	**2,1%**	**-0,8%**
WELT GESAMT	**1.942.402**	**1.904.602**	**-0,1%**	**-1,9%**

Source: Barth Report Hops 2018/2019

The rankings of the top beer-producing nations remain unchanged, led by China, the USA, Brazil, Mexico and Germany. “These five countries account for roughly 950 million hectolitres, which is about half of world beer production.” (Stephan Barth):

Ranking	**Country**	**Beer output in 2018**
1	China	381,200
2	USA	214,600
3	Brazil	141,400
4	Mexico	119,800
5	Germany	93,700
TOP 5		**950,700**
World beer output		**1,905,000**

Output in 1,000 hl

Enquiries to:

Erich Dederichs, press office, Joh. Barth & Sohn
c/o dederichs kommunikation GmbH
Tel.: +49 (0)228-223258
presse@johbarth.de

Joh. Barth & Sohn is Germany’s leading provider of hop-related services. Joh. Barth & Sohn is part of the BARTH-HAAS GROUP. The group operates on every continent and is made up of family-owned companies. Depending on the season, the group has between 700 and 1,000 employees worldwide

BARTH-HAAS GROUP

Freiligrathstrasse 7/9 • 90482 Nuremberg
Tel. +49-911-5489-0 • Fax +49-911-5489-330
E-Mail: info@johbarth.de • www.barthhaasgroup.com

Press release

40 brewing groups account for almost 90 per cent of world beer production
Seven German brewing groups among the TOP 40 worldwide

Nuremberg, July 2019. The 40 largest brewing groups account for just under 90 per cent of world beer production of approx. 1.9 billion hectolitres. The five biggest groups alone produce roughly 60 per cent of this total. These figures are contained in the new Barth Report Hops 2018/2019 published by Joh. Barth & Sohn, the world's leading provider of hop-related services.

The seven German brewing groups among the TOP 40 worldwide have a joint world market share of 2.7 per cent. They are Radeberger, ranked number 21, TCB-Beteiligungsgesellschaft (26), Oettinger (27), Bitburger (30), Krombacher (31), Paulaner (32) and Warsteiner (37).

NB: The complete list is attached.

Enquiries to:

Erich Dederichs, press office, Joh. Barth & Sohn
c/o dederichs kommunikation GmbH
Tel.: +49 (0)228-223258
presse@johbarth.de

BARTH-HAAS GROUP

Freiligrathstrasse 7/9 • 90482 Nuremberg
Tel. +49-911-5489-0 • Fax +49-911-5489-330
E-Mail: info@johbarth.de • www.barthhaasgroup.com

The world's top 40 brewing groups (last updated: 31.12.2018)

The data were taken from the brewers' own annual reports. In other cases, after different sources had provided differing figures, or where no figures were available, the production volume had to be estimated.

Rang	Brauerei	Land	Bierausstoß 2018 in Mio. hl	Anteil an der Welt-Bierproduktion
1	AB InBev	Belgien	567,0	29,8%
2	Heineken	Niederlande	233,8	12,3%
3	China Res. Snow Breweries	China	121,0	6,4%
4	Carlsberg	Dänemark	112,3	5,9%
5	Molson Coors	USA/Kanada	96,6	5,1%
6	Tsingtao Brewery Group	China	80,3	4,2%
7	Asahi	Japan	57,9	3,0%
8	BGI / Groupe Castel	Frankreich	40,5	2,1%
9	Yanjing	China	38,0	2,0%
10	Efes Group	Türkei	31,8	1,7%
11	Grupo Petrópolis	Brasilien	30,0	1,6%
12	Kirin	Japan	27,8	1,5%
13	San Miguel Corporation	Philippinen	24,0	1,3%
14	Constellation Brands	USA	22,0	1,2%
15	Diageo (Guinness)	Irland	20,0	1,1%
16	Saigon Beverage Corp. (SABECO)	Vietnam	17,0	0,9%
17	Singha Corporation	Thailand	12,9	0,7%
18	CCU	Chile	12,9	0,7%
19	Grupo Mahou – San Miguel	Spanien	12,7	0,7%
20	United Breweries	Indien	12,5	0,7%
21	Radeberger Gruppe	Deutschland	11,8	0,6%
22	Damm	Spanien	11,5	0,6%
23	Pearl River	China	10,7	0,6%
24	Beer Thai (Chang)	Thailand	9,0	0,5%
25	Suntory	Japan	8,8	0,5%
26	TCB Beteiligungsgesellschaft mbH	Deutschland	8,6	0,5%
27	Oettinger	Deutschland	8,5	0,4%
28	Sapporo	Japan	8,4	0,4%
29	Swinkels Family Brewers	Niederlande	7,8	0,4%
30	Bitburger Braugruppe	Deutschland	6,6	0,3%
31	Krombacher	Deutschland	6,3	0,3%
32	Paulaner Brauerei Gruppe	Deutschland	6,0	0,3%
33	HiteJinro	Südkorea	5,4	0,3%
34	Royal Unibrew	Dänemark	5,2	0,3%
35	Hanoi Beverage Corp. (HABECO)	Vietnam	4,5	0,2%
36	Obolon	Ukraine	4,2	0,2%
37	Warsteiner	Deutschland	4,0	0,2%
38	Olvi Group	Finnland	4,0	0,2%
39	Polar	Venezuela	3,9	0,2%
40	Gold Star	China	3,6	0,2%
Gesamt			1.709,8	89,8%
Welt-Bierproduktion 2018			1.904,6	100,0%

Source: Barth Report Hops 2018/2019

BARTH-HAAS GROUP
c/o Joh. Barth & Sohn GmbH & Co. KG
Freiligrathstrasse 7/9 • 90482 Nuremberg
Tel. +49-911-5489-0 • Fax +49-911-5489-330
E-mail: info@johbarth.de • www.barthhaasgroup.com

World hop and beer markets present mixed picture in 2019

- **World hop acreage largest since 1997**
- **2019 alpha demand at record high**
- **World hop market more likely undersupplied**
- **World beer output in decline since 2014**

Nuremberg, July 2019. "The world beer and hop markets were characterised by different developments in 2018/2019." This was the conclusion drawn by Stephan Barth, Managing Partner at Joh. Barth & Sohn, at the presentation of the new Barth Report Hops 2018/2019. On the one hand, world hop acreage, he said, was greater than at any time since 1997, totalling roughly 60,400 hectares. At the same time, however, yields and alpha values were slightly below average. As Barth pointed out, this negative development contrasts with rising demand for hops, as lightly hopped mainstream beers are losing market share to heavily hopped ones. Although world beer production has been decreasing since 2014, estimated alpha demand is rising to unprecedented levels. "All in all, we view the hop market as being more likely undersupplied. This can be seen not least in the prices for non-contracted hops which remain high both for aroma and for bitter varieties." (Barth)

Barth went on to say that with their combined share of hop acreage totalling 72 %, Germany and the USA dominated the world market to a greater extent than ever. Their joint share of world hop volume (77 per cent) and alpha volume (83 per cent), he added, conveyed an even clearer message. According to Barth, the increasing dominance of the USA can be seen in terms of both the hop acreage and the range of hop varieties grown there. For example, there are now 87 different varieties being grown in the USA, as many as 36 of which come from proprietary breeding programmes. Seven US varieties now belong to the "big eight" aroma/flavour varieties, i.e. those varieties that are virtually indispensable for flavour-intensive dry-hopped beers. Number eight in this group is an Australian variety.

"Nevertheless, the hop market in the USA does have some problems. While there is a surplus of some aroma varieties, there is a supply shortage among the bitter varieties. If the crop develops normally in 2019, the harvest should provide the brewing industry with sufficient quantities of bitter hops." (Barth)

A very high proportion of the world market in hops awaiting harvest this year has been forward-contracted. Barth added that due to the constant expansion of acreage in recent years, however, many variety segments were approaching saturation point. The price levels for non-contracted hops harvested in 2018 were high in virtually all variety segments. This in turn affected the contract market. In recent years, contracts signed in both the USA and Germany have featured good conditions and long durations. "The resulting stability forms an

indispensable foundation upon which the investments in infrastructure and quality that are necessary in the first place can be made in connection with the necessary expansion of acreage.” (Barth)

Enquiries to:

Erich Dederichs, press office, Joh. Barth & Sohn
c/o dederichs kommunikation GmbH
Tel.: (+49) 0228 223258
presse@johbarth.de

BARTH-HAAS GROUP
c/o Joh. Barth & Sohn GmbH & Co. KG
Freiligrathstrasse 7/9 • 90482 Nuremberg
Tel. +49-911-5489-0 • Fax +49-911-5489-330
E-mail: info@johbarth.de • www.barthhaasgroup.com

Fact sheet:
Key figures on the hop market

Essential key figures on the hop market

	2017	2018	Change
Beer output in million hl			
World	1,942	1,905	-1.9 %
Germany	93	94	0.7%
Hop acreage in ha			
World	58,889	60,383	+2.5%
Germany	19,543	20,144	3.1%
Hop crop volume in mt			
World	118,536	118,410	-0.1%
Germany	41,556	41,794	0.6%
Alpha acid production in mt			
World	11,261	10,925	-3.0%
Germany	4,047	3,828	-5.4%

Source: BARTH REPORT Hops 2018/2019

Enquiries to:

Erich Dederichs, press office, Joh. Barth & Sohn
c/o dederichs kommunikation GmbH
Tel.: +49 (0)228-223258
presse@johbarth.de

Last updated: July 2019